U.S. Department of Education

Washington, D.C. 20202-5335

APPLICATION FOR GRANTS UNDER THE

Expanding Opportunity Through Quality CSP -Grants to State Entities

CFDA # 84.282A

PR/Award # S282A220006

Gramts.gov Tracking#: GRANT13692665

OMB No. 1810-0767, Expiration Date:

Closing Date: Aug 05, 2022

PR/Award # S282A220006

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This application was generated using the PDF functionality. The PDF functionality automatically numbers the pages in this application. Some pages/sections of this application may contain 2 sets of page numbers, one set created by the applicant and the other set created by e-Application's PDF functionality. Page numbers created by the e-Application PDF functionality will be preceded by the letter e (for example, e1, e2, e3, etc.).

Application for Federal Assistance SF-424									
* 1. Type of Submissi	reapplication New								
* 3. Date Received:									
5a. Federal Entity Ide	5a. Federal Entity Identifier: 5b. Federal Award Identifier:								
State Use Only:				-					
6. Date Received by	State:		7. State Application lo	dent	tifier: GA				
8. APPLICANT INFO	ORMATION:								
* a. Legal Name: St	tate Charter S	chools	Foundation of G	Geo	orgia, Inc.				
* b. Employer/Taxpay	ver Identification Nun	nber (EIN	J/TIN):	* (c. UEI:				
d. Address:									
* Street1:	205 Jesse Hill	l Jr.	Dr. SE						
Street2:	Suite 504								
* City:	Atlanta								
County/Parish:									
* State:	GA: Georgia								
Province:									
* Country:	USA: UNITED S	TATES							
* Zip / Postal Code:	30334-9033								
e. Organizational U	Init:			_					
Department Name:				Di	Division Name:				
f. Name and contac	ct information of pe	erson to	be contacted on ma	tter	rs involving this application:				
Prefix: Ms.			* First Name:	:	Michele				
Middle Name: J									
* Last Name: Nee	Last Name: Neely								
Suffix:									
Title: President									
Organizational Affiliat	tion:								
* Telephone Number				_	Fax Number:				
* Email:									

PR/Award # S282A220006

Application for Federal Assistance SF-424
* 9. Type of Applicant 1: Select Applicant Type:
M: Nonprofit with 501C3 IRS Status (Other than Institution of Higher Education)
Type of Applicant 2: Select Applicant Type:
Type of Applicant 3: Select Applicant Type:
* Other (specify):
* 10. Name of Federal Agency:
Department of Education
11. Catalog of Federal Domestic Assistance Number:
84.282
CFDA Title:
Charter Schools
* 12. Funding Opportunity Number: ED-GRANTS-070622-001
* Title:
Office of Elementary and Secondary Education (OESE): Charter School Programs (CSP): Charter School Programs State Entities (SE), Assistance Listing Number 84.282A
13. Competition Identification Number:
84-282A2022-1
Title:
Expanding Opportunity Through Quality Charter Schools Program - Grants to State Entities
14. Areas Affected by Project (Cities, Counties, States, etc.):
Add Attachment Delete Attachment View Attachment
* 15. Descriptive Title of Applicant's Project:
Georgia Strategic Charter School Growth Initiative
Attach supporting documents as specified in agency instructions.
Add Attachments Delete Attachments View Attachments

1

Application for Federal Assistance SF-424						
16. Congressional Districts Of:						
* a. Applicant GA-005 * b. Program/Project GA-all						
Attach an additional list of Program/Project Congressional Districts if needed.						
Add Attachment Delete Attachment View Attachment						
17. Proposed Project:						
* a. Start Date: 10/01/2022 * b. End Date: 09/30/2027						
18. Estimated Funding (\$):						
* a. Federal						
* b. Applicant						
* c. State						
* d. Local						
* e. Other						
* f. Program Income						
* g. TOTAL						
* 19. Is Application Subject to Review By State Under Executive Order 12372 Process?						
a. This application was made available to the State under the Executive Order 12372 Process for review on						
b. Program is subject to E.O. 12372 but has not been selected by the State for review.						
C. Program is not covered by E.O. 12372.						
* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.)						
Yes No						
If "Yes", provide explanation and attach						
Add Attachment Delete Attachment View Attachment						
 21. *By signing this application, I certify (1) to the statements contained in the list of certifications** and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001) 						
Authorized Representative:						
Prefix: Ms. * First Name: Michele						
Middle Name: Joy						
* Last Name: Neely						
Suffix:						
* Title: President						
* Telephone Number:						
* Email:						
* Signature of Authorized Representative: Michele Neely * Date Signed: 08/05/2022						

PR/Award # S282A220006

The purpose of this enclosure is to inform you about a new provision in the Department of Education's General Education Provisions Act (GEPA) that applies to applicants for new grant awards under Department programs. This provision is Section 427 of GEPA, enacted as part of the Improving America's Schools Act of 1994 (Public Law (P.L.) 103-382).

To Whom Does This Provision Apply?

Section 427 of GEPA affects applicants for new grant awards under this program. ALL APPLICANTS FOR NEW AWARDS MUST INCLUDE INFORMATION IN THEIR APPLICATIONS TO ADDRESS THIS NEW PROVISION IN ORDER TO RECEIVE FUNDING UNDER THIS PROGRAM.

(If this program is a State-formula grant program, a State needs to provide this description only for projects or activities that it carries out with funds reserved for State-level uses. In addition, local school districts or other eligible applicants that apply to the State for funding need to provide this description in their applications to the State for funding. The State would be responsible for ensuring that the school district or other local entity has submitted a sufficient section 427 statement as described below.)

What Does This Provision Require?

Section 427 requires each applicant for funds (other than an individual person) to include in its application a description of the steps the applicant proposes to take to ensure equitable access to, and participation in, its Federally-assisted program for students, teachers, and other program beneficiaries with special needs. This provision allows applicants discretion in developing the required description. The statute highlights six types of barriers that can impede equitable access or participation: gender, race, national origin, color, disability, or age. Based on local circumstances, you should determine whether these or other barriers may prevent your students, teachers, etc. from such access or participation in, the Federally-funded project or activity. The description in your application of steps to be taken to overcome these barriers need not be lengthy; you may provide a clear and succinct description of how you plan to address those barriers that are applicable to your circumstances. In addition, the information may be provided in a single narrative, or, if appropriate, may

be discussed in connection with related topics in the application.

Section 427 is not intended to duplicate the requirements of civil rights statutes, but rather to ensure that, in designing their projects, applicants for Federal funds address equity concerns that may affect the ability of certain potential beneficiaries to fully participate in the project and to achieve to high standards. Consistent with program requirements and its approved application, an applicant may use the Federal funds awarded to it to eliminate barriers it identifies.

What are Examples of How an Applicant Might Satisfy the Requirement of This Provision?

The following examples may help illustrate how an applicant may comply with Section 427.

(1) An applicant that proposes to carry out an adult literacy project serving, among others, adults with limited English proficiency, might describe in its application how it intends to distribute a brochure about the proposed project to such potential participants in their native language.

(2) An applicant that proposes to develop instructional materials for classroom use might describe how it will make the materials available on audio tape or in braille for students who are blind.

(3) An applicant that proposes to carry out a model science program for secondary students and is concerned that girls may be less likely than boys to enroll in the course, might indicate how it intends to conduct "outreach" efforts to girls, to encourage their enrollment.

(4) An applicant that proposes a project to increase school safety might describe the special efforts it will take to address concern of lesbian, gay, bisexual, and transgender students, and efforts to reach out to and involve the families of LGBT students.

We recognize that many applicants may already be implementing effective steps to ensure equity of access and participation in their grant programs, and we appreciate your cooperation in responding to the requirements of this provision.

Estimated Burden Statement for GEPA Requirements

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The obligation to respond to this collection is required to obtain or retain benefit (Public Law 103-382). Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Education, 400 Maryland Ave., SW, Washington, DC 20210-4537 or email ICDocketMgr@ed.gov and reference the OMB Control Number 1894-0005.

Optional - You may attach 1 file to this page.

1240-Georgia GEPA Statement.pdf

Add Attachment

Delete Attachment V

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Funding Opportunity Number: ED-GRANTS-070622-001 Received Date: Aug 05, 2022 05:29:39 PM EDT







State Charter Schools Foundation of Georgia, Inc. Georgia Department of Education State Charter Schools Commission of Georgia

Joint Section 427 of the General Education Provision Act (GEPA) Statement

The State Charter Schools Foundation of Georgia, Inc. (SCSF), State Charter Schools Commission of Georgia (SCSC), and Georgia Department of Education (GaDOE) (Parties) will use fiscal year (FY) 2022 Charter School Program (CSP) grant funds to encourage the expansion of new and replicated high-quality charter schools in communities with limited access to innovative and high-quality education options. The SCSF, GaDOE, and SCSC have identified the following barriers and associated solutions for using grant funds.

To address barriers to high-quality educational options for families in rural communities, the parties will use grant funds to implement and widely publicize practices that prioritize new charter applicants and potential subgrantees serving rural areas of the state and otherwise underserved communities. Subgrantees serving rural communities will be eligible for additional grant funds.

To address informational and communication barriers that limit access to information about charter school options in educationally underserved communities, grant funds will be used to conduct targeted outreach that provides accurate information about charter schools throughout the state. All outreach and communication will be provided in formats accessible to individuals with disabilities and translated, as appropriate, for communities where languages other than English are spoken.

To address barriers for new charter schools associated with the procurement of suitable facilities, grant funds will be used to assist subgrantees in identifying and securing appropriate charter school facilities that are geographically accessible to underserved communities. The SCSC will provide technical assistance to subgrantees to ensure that facilities are accessible to individuals with disabilities, as the Americans with Disabilities Act (ADA) requires.

To address barriers that limit students' participation in charter school programs or that deny certain students the benefits of high-quality educational options:

- The parties will use grant funds to ensure that charter application processes in Georgia prioritize charter schools targeting underserved communities.
- The parties will use grant funds to provide technical assistance to encourage charter applications that pursue educational equality by proactively eliminating practices that discriminate or otherwise limit participation based on race, color, national origin, sex, disability, or age.
- Grant funds will be used to ensure approved charter applications include plans to remove barriers that limit access to charter schools. All charter applications approved by the SCSC will consist of appropriate methods for serving English Learners (EL) and students with disabilities as required by Title VI of the Civil Rights Act, the Individuals with Education Disabilities Act, and Section 504 of the Rehabilitation Act.

• The SCSC will tailor its charter application process to ensure that applicants propose appropriate plans for eliminating transportation challenges that create barriers to participation for economically disadvantaged students.

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION						
State Charter Schools Foundation of Georgia, Inc.						
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE						
Prefix: Ms. * First Name: Michele	Middle Name: Joy					
* Last Name: Neely	Suffix:					
* Title: President						
* SIGNATURE: Michele Neely * DA	TE: 08/05/2022					

U.S. Department of Education Supplemental Information for the SF-424 Application for Federal Assistance

1. Project Director:

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
Ms.	Michele		Neely	
Project Directo	or Level of Effort (percentage o	f time devoted to grant):		
	Si Level of Enort (percentage o			
Address:				
* Street1:	205 Jesse Hill Jr. Dri	ve SE		
Street2:				
* City:	Atlanta			
County:	GA			
* State:	GA: Georgia			
* Zip Code:	30334-9033			
Country:	USA: UNITED STATES			
Email Addres				
	I Grantee or Novice Applicar			
	her a new potential grantee or ng applications (NIA)?	novice applicant as defined in	the program competition's	
X Yes	No			
		ompetitive preference points fo r application? (the NIA will indi	r a new potential grantee or novic cate how many are available)	e applicant,
1			. ,	
	portunity Zones:			
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4. Human Subjects Research:

~	Are any recease	a ativiti a a i avalvina	human auhianta	planned at any the	me during the proposed	Drainat Dariad?
a.	Are any research	i activities involvind	numan subjects	planned at any til	me aumna me proposec	Project Period?
					J	

Yes X No								
b. Are ALL the research activities proposed de	esignated	to be ex	empt fror	m the reg	gulations	?		
Yes Provide Exemption(s) #(s):	1	2	3	4	5	6	7	8
No Provide Assurance #(s), if available	e:							

c. If applicable, please attach your "Exempt Research" or "Nonexempt Research" narrative to this form as indicated in the definitions page in the attached instructions.

	Add Attachment	Delete Attachment	View Attachment

Abstract

An abstract is to be submitted in accordance with the following:

- 1. Abstract Requirements
 - Abstracts must not exceed one page and should use language that will be understood by a range of audiences.
 - Abstracts must include the project title, goals, and expected outcomes and contributions related to research, policy, and practice.
 - Abstracts must include the population(s) to be served.
 - Abstracts must include primary activities to be performed by the recipient.
 - Abstracts must include subrecipient activities that are known or specified at the time of application submission.

For research applications, abstracts also include the following:

- Theoretical and conceptual background of the study (i.e., prior research that the investigation builds upon and that provides a compelling rationale for this study).
- Research issues, hypotheses and questions being addressed.
- Study design including a brief description of the sample including sample size, methods, principals, and dependent, independent, and control variables, as well as the approach to data analysis.

[Note: For a non-electronic submission, include the name and address of your organization and the name, phone number and e-mail address of the contact person for this project.]

You may now Close the Form

You have attached 1 file to this page, no more files may be added. To add a different file, you must first delete the existing file.

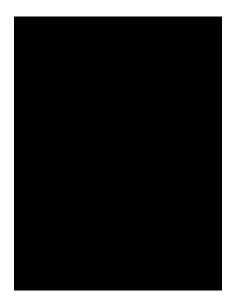
* Attachment: 1243-Georgia - Part 3 - Project Abstract - CSP Sta	Add Attachment	Delete Attachment	View Attachment
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GEORGIA STRATEGIC CHARTER SCHOOL GROWTH INITIATIVE

A PROPOSAL FOR FY2022 CSP GRANTS TO STATE ENTITIES

Presented by the State Charter Schools Foundation of Georgia

PART 3: PROJECT ABSTRACT











Georgia Strategic Charter School Growth Initiative

Applicants: State Charter Schools Foundation of Georgia, Inc. (nonprofit statewide charter school support entity), Georgia Department of Education (SEA), State Charter Schools Commission of Georgia (independent statewide charter authorizing board).
Address (all applicants): 205 Jesse Hill Jr. Drive, SE, Atlanta, GA 30334-9033
Contact: Michele Neely, President, SCSF -

The Georgia Strategic Charter School Growth Initiative (Charter Growth Initiative) was established in 2022 with funding from the GEER II fund to support the creation, replication, or expansion of highly-effective charter schools in underserved Georgia communities. The applicants are proposing to expand and continue the Charter Growth Initiative with CSP funds and meet all CSP priority areas with the following goals:

- **1.** Support the replication, expansion, or creation of 32 high-quality charter schools that are responsive to community need in Georgia with technical assistance and grants, including a new school leader fellowship and a replication cohort program.
- Educate and engage communities across Georgia about charter schools with community outreach events and a comprehensive charter school website (FindaGaCharter.org).
- Promote consistent, quality charter school authorizing by providing technical assistance to authorizers, engaging in evaluations of practices, and supporting the Georgia Principles and Standards for Charter School Authorizing.
- 4. Disseminate charter school best practices and offer additional support to high-need public schools, including charter schools and local district schools, with an emphasis on supporting TSI, ATSI, and Promise schools.

* Mandatory Project Narrative File Filenar	me: 1241-Georgia - Part 4 - Application Narrative - CSP St
Add Mandatory Project Narrative File De	elete Mandatory Project Narrative File View Mandatory Project Narrative File

To add more Project Narrative File attachments, please use the attachment buttons below.

Add Optional Project Narrative File

GEORGIA STRATEGIC CHARTER SCHOOL GROWTH INITIATIVE

A PROPOSAL FOR FY2022 CSP GRANTS TO STATE ENTITIES

Presented by the State Charter Schools Foundation of Georgia

PART 4: APPLICATION NARRATIVE









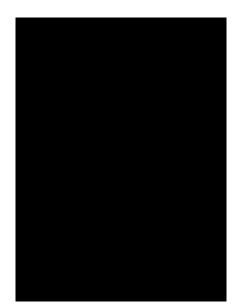


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Background

The demand for high-quality, community-responsive charter schools has grown across Georgia, but many regions in the state do not have a single community-based charter school. The Georgia Strategic Charter School Growth Initiative (Georgia Charter Growth Initiative) was established in 2022 with a grant from the Office of the Governor of Georgia from the GEER II fund to expand charter school options for Georgia families by supporting the replication or expansion of highly-effective charter schools and the creation of start-up charter schools in underserved Georgia communities. This proposal is presented by the State Charter Schools Foundation of Georgia (SCSF), the lead applicant/fiscal agent and nonprofit statewide charter school support entity; the Georgia Department of Education (GaDOE), the state educational agency (SEA); and the State Charter Schools Commission of Georgia (SCSC), the state's independent charter school authorizing board. The applicants are proposing to meet all CSP priority areas and expand the reach of the Charter Growth Initiative in this CSP proposal with the following goals:

- Support the replication, expansion, or creation of 32 high-quality charter schools that are
 responsive to community need in Georgia with technical assistance and grants, including a new
 school leader fellowship and a replication cohort program, leading to the creation of at least
 6,000 new charter school seats in five years.
- **2.** Educate and engage communities across Georgia about charter schools with community outreach events and a comprehensive charter school website (FindaGaCharter.org).
- **3.** Promote consistent, quality charter school authorizing by providing technical assistance to authorizers, engaging in evaluations of practices, and supporting the Georgia Principles and Standards for Charter School Authorizing.

4. Disseminate charter school best practices and offer additional support to high-need public schools, including charter schools and local district schools, with an emphasis on supporting TSI, ATSI, and Promise schools.

A New Collaboration

This CSP State Entity Grant application proposes expanding and continuing the Georgia Strategic Charter Growth Initiative (Charter



Growth Initiative), which was established in 2022, with funds from a GEER II grant from the Office of the Governor. The SCSF is the fiscal agent and administrator of the GEER II grant and the consortium leading the initiative, which includes the SCSF, SCSC, and Georgia Charter Schools Association (GCSA). Funds for this new initiative will be expended by September 2023, and the subgrants to schools are not sufficient for schools to carry out their replication, expansion, creation plans, creating a major barrier for the successful execution of school plans. This CSP grant will enable the Charter Growth Initiative to grant larger subgrants to schools, continue the technical assistance that the initiative provides, and expand the initiative for an even greater impact. As a part of this CSP application, the SCSF is partnering with the SCSC and GaDOE to form a strong alliance to support struggling schools and charter school authorizers. The SCSF will be the fiscal agent and administrator for the Charter Growth Initiative and CSP grant. The three co-applicants will strengthen this cohesive statewide system that has the broad support of charter schools, communities, lawmakers, and nonprofit organizations engaged in public education.

The Charter Growth Initiative features subgrants for new, replicating, and expanding highquality charter schools coupled with cohort-based technical assistance provided by charter school sector leaders. In addition, the initiative includes a robust charter school communications

campaign, focused on engaging communities and expanding charter school options in underserved communities in Georgia, including in-person and virtual information sessions. A newly-created website, <u>FindaGaCharter.org</u> will provide the public with information about charter schools, subgrant and technical assistance opportunities for charter schools, and a charter school locator including all charter schools in Georgia searchable by location, authorizer, attendance zone, grade band(s), and unique educational focus. This website is the first of its kind in Georgia and is being developed jointly by the SCSF, SCSC, and Georgia Charter Schools Association.

This proposal brings together three key statewide entities to build upon the cohesive statewide system to maximize impact of charter school growth efforts. The co-applicants seek to extend and expand the Georgia Charter Growth Initiative by combining their collective expertise and programs:

- 1. The Georgia Strategic Charter School Growth Initiative (launched by the SCSF, SCSC, and Georgia Charter Schools Association), led by the SCSF, is currently underway to provide technical assistance and grants to new and replicating and expanding charter schools and educate the public about charter schools.
- 2. GaDOE is completing administration for the final subgrants for new charter schools under the FY2016 CSP State Entity Grant, which is operating under a No-cost Extension.
- 3. GaDOE and the SCSC jointly drafted the Georgia Principles and Standards for Charter School Authorizing, and GaDOE is offering training for authorizers through a contract with the National Association of Charter School Authorizers (NACSA).
- GaDOE provides extensive support to struggling districts and schools with technical assistance and resources and offers best practices to help charter schools and traditional district public schools.

5. The SCSC has engaged in research studies to determine the effectiveness and economic impact of charter schools in Georgia and has set a bold strategic plan with geographic and grade band priorities to lead charter growth in the state.

Together, the co-applicants present a united vision for charter school growth in Georgia that is based on community need and engagement. As a part of this expanded initiative, new charter schools approved by the SCSC or local authorizer and existing charter schools approved for expansion or replication will be eligible for technical assistance and subgrants to support their efforts, leading to 32 new, expanded, or replicated charter schools, with at least 6,000 new charter school seats over the next five years. The initiative considers the geographic priorities established by the SCSC to expand the reach of charter schools in Georgia and reduce the concentration of charter schools in saturated communities. In addition, the initiative will consider the goals established in the SCSC's strategic plan, which includes supporting new charter school high schools and charter schools in rural communities. Technical assistance will be provided to schools before they replicate or expand or open a new school, so that schools start with a strong foundation.

The broadened initiative will also include technical assistance and support to charter school authorizers in accordance with the <u>Georgia Principles and Standards for Charter School</u> <u>Authorizing</u> and an effort to educate charter schools about the standards, implementing an evaluation process. Finally, the initiative will disseminate best practices from charter schools to struggling charter schools and traditional public schools to improve student outcomes, particularly among educationally disadvantaged students and students in alternative education programs. The co-applicants will provide support for high-need charter schools to serve their students.

Key Updates to Georgia CSP Grant Strategy

The applicants are applying lessons learned from implementation of a previous CSP grant when designing the proposal for FY2022 CSP State Entity grants. Key updates to the strategy include the following:

- Forming a consortium to maximize impact, build on organizations' strengths, and ensure a coordinated approach to charter school growth.
- Including grants for replicating and expanding charter schools, in addition to grants for new schools.
- Varying grant amounts based on key priorities, awarding additional funds to schools serving high school grades or locating in rural communities.
- Providing significant technical assistance related to charter school growth and operations to subgrantees.
- Including a formalized communications strategy to engage communities, provide transparent information to the public, and help families find charter schools.
- Integrating technical assistance for charter school authorizers to ensure quality authorizing and encourage more locally-approved charter schools.
- Incorporating the dissemination of charter school best practices and further sharing technical assistance and resources to struggling public schools.

Priorities

Absolute Priority – Best Practices for Charter School Authorizers

The State of Georgia can show that it meets the requirements of the Absolute Priority. Historically, Georgia has demonstrated a significant commitment to high-quality charter school authorizing throughout the state. In 2017, the Georgia General Assembly passed a law (O.C.G.A.

§ 20-2-2063.3) requiring the State Board of Education (SBOE) and the State Charter Schools Commission (SCSC) to establish a code of principles and standards of charter school authorizing. In December 2021, the SBOE adopted the standards as drafted by the SCSC and the Georgia Department of Education (GaDOE), following a period of feedback. The standards are designed to evaluate Georgia charter authorizing bodies on authorizing practices and are informed by both the <u>National Association of Charter School Authorizers (NACSA) Principles & Standards for</u> Quality Charter School Authorizing and Georgia laws and rules.

These principles and standards, which are based on national best practices and the Principles & Standards for Quality Authorizing established by NACSA, were approved by the State Board of Education in 2021 and have been shared with all authorizers in the state. Currently the SCSC and GaDOE are developing detailed measures to support the standards. These measures will provide concrete, fair, and objective means for evaluating authorizer performance in Georgia, ensuring that authorizers understand the components of high-quality authorizing and are held to them. Once the measures are completed and released in Fall of 2022, the SCSC and GaDOE will hire an independent party with "a demonstrated history of evaluating charter school authorizers for quality authorizing practices" to ensure adherence to the principles and standards of charter school authorizing practices (O.C.G.A. § 20-2-2063.3(b)(1)). This party will perform a rigorous evaluation of all Georgia authorizers each year.

The State-Board-approved authorizing principles and standards require: "(1) Maintaining high standards for approving charter petitions; (2) Establishing high academic, financial, and operational performance standards for charter schools; (3) Annually monitoring, evaluating, and reporting charter school progress in meeting academic, financial, and operational performance standards; (4) Upholding charter school autonomy in school governance, instructional program

implementation, personnel, and budgeting; (5) Protecting students and holding charter schools accountable for their obligations to all students; and (6) Protecting the public interest and holding charter schools accountable for their obligations of governance, management, and oversight of public funds." (O.C.G.A. § 20-2-2063.3 (a)).

Charter schools authorized by a local board of education that fail to meet the standards for two consecutive years may petition to transfer their charter authorization to the SCSC.

As part of standards implementation, GaDOE has contracted with NACSA to provide a series of eight online training modules based on the standards and on NACSA's Principles & Standards. These authorizer training modules were created in coordination with GaDOE staff and adjusted to reflect feedback provided by trainees on an ongoing basis. Modules include a trainee quiz component, the results of which provide additional opportunities for course correction and focus on areas of particular need. Additionally, GaDOE staff discuss module content with local authorizers at bi-monthly authorizer meetings to ensure that expectations are clear and that authorizers have the tools they need to implement strong practice.

GaDOE will utilize CSP grant funds to continue using the NACSA authorizer modules as an ongoing training tool, both for onboarding new local district and GaDOE staff and for remediating challenges uncovered in the annual authorizer-standards-based performance evaluation.

Finally, GaDOE is developing a full Authorizer Manual that outlines both the requirements and best practices for quality authorizing that covers every stage of the authorizing life cycle from consideration of a charter petition, approval and start-up support, ongoing support and monitoring, and if necessary, school closure. The Authorizer Manual will align with the authorizer standards and will serve as the foundation for the additional training necessary for current local authorizers and the guide for encouraging more districts to become new local authorizers.

Competitive Preference Priority 1 – At Least One Authorized Public Chartering Agency Other than a Local Educational Agency, or an Appeals Process

That State of Georgia meets Competitive Preference Priority by having a statewide chartering agency. The State Charter Schools Commission of Georgia, a state agency and co-applicant for this proposal, is an authorized public chartering agency that is not a local educational agency (LEA). Pursuant to O.C.G.A. § 20-2-2084, a charter school petitioning for authorization by the SCSC must either: (a) Have a state-wide attendance zone; or (b) Have a defined attendance zone and demonstrate that the charter school has special characteristics, such as a special population, a special curriculum, or some other feature or features which enhance educational opportunities. If a petitioner is denied a charter from an LEA, the petitioner may submit a petition to the SCSC for consideration. Charter schools authorized by the SCSC are single-school local educational agencies (LEAs), affording them the maximum flexibility to meet student needs.

Competitive Preference Priority 2 – Equitable Financing

The State of Georgia can demonstrate that it meets Competitive Preference Priority 2 with a law that requires equitable financing for charter schools. Title 20 of Georgia Code, <u>The Charter</u> <u>Schools Act of 1998</u>, ensures equitable financing of charter schools in Georgia compared to other public schools in the state. In § 20-2-2068.1. Quality basic education formula applies; grants, local tax revenue, and funds from local bonds, Georgia law requires charter schools to be included in the allotment of Quality Basic Education (QBE) formula earnings (pursuant to Code Section 20-2-161), applicable QBE grants, applicable non-QBE state grants, and applicable federal grants. QBE earnings represent the share of funds from the State of Georgia allocated to public schools.

The law further stipulates that a charter school shall be treated no less favorably than other schools within its school system with respect to the provision of funds for instruction, school administration, transportation, food services, and, where feasible, building programs.

State-authorized charter schools, single-school LEAs, do not receive local revenue; therefore, Georgia law (GA Code § 20-2-2089) provides for a per-pupil proxy for local revenue, known as the state charter school supplement, which is intended to compensate for this lack of local funding. The state charter supplement formula consists of three broad categories that are intended to provide equitable per-pupil funding based on the geographic location of the school: a proxy for local funding (i.e. the approximate amount of local funding a state charter school would have received based on its location), a proxy for capital outlay funding which school districts typically receive (i.e. a capital allocation to help offset common facilities expenses) and, like local districts, monies for categorical grants which help schools provide critical school services (e.g. transportation, nutrition, etc.).

All charter schools in Georgia are able to participate in bond financing for facility purchase and a number have done so, including Amana Academy in Fulton County and International Community School in DeKalb County, whose bond allowed it to move out of a church and into its own building. O.C.G.A. § 48-8-144(b) allows locally-approved charter schools to share in earnings received through special-purpose local options sales tax (SPLOST) funds for capital outlay projects, which are typically facility- or technology-based.

Competitive Preference Priority 3 – Best Practices to Improve Struggling Schools and LEAs

The State of Georgia can show that it meets the requirements of Competitive Preference Priority 3. The Georgia Department of Education's (GaDOE) Charter School Division (CSD) has a multi-year partnership with Research Education Laboratories (REL-SE) to study Georgia's charter schools and school systems and the impact of flexibility on their academic performance. Through this partnership, REL-SE has examined the impact of the following promising practices on student outcomes at several charter schools:

- Implementation of rigorous curriculum such as Core Knowledge and STEM;
- Strong instructional practices such as differentiated instruction, inquiry-based learning, and performance grouping;
- Effective teacher management practices such as continuous professional development and peer observation and feedback;
- Instructional leadership practices such as focused data walks with staff, monitoring for fidelity to instructional model and school philosophy; and
- Effective operations strategies such as extended day, math, ELA, science, and social studies taught across the curriculum, and multi-age grouping.

Capitalizing on this information, in 2018 and 2019, GaDOE and REL-SE held a series of resource allocation coaching sessions with struggling school systems, utilizing and promoting successful practices shared by charter schools. These meetings brought together rural and urban and poor and affluent districts, focusing on finding charter-based solutions to long-standing structural and resource-based challenges. At the conclusion of session, each district was given a

"toolkit" consisting of instructional, organizational, instructional, and financial strategies successfully implemented across the state at high-performing charter schools and charter systems.

Over the next five years, GaDOE plans to continue its work with REL-SE to further seek out and compile best practices in order to continue supporting struggling schools and school districts throughout the state. GaDOE plans to use a portion of the CSP funds to design a website highlighting those best- and promising-practices that can be clearly connected to improved student outcomes, giving each school and school-district in need a web-based virtual toolkit that can be accessed at any time.

The GaDOE Charter School Division (CSD) also plans to increase its collaboration with the GaDOE Office of School Improvement, which provides support to federally-identified low performing schools, using the best- and promising practices identified above to support the lowest performing schools in the state. The specific type of support offered, training expectations, and performance requirements will be documented as part of the five-year performance contracts the 178 of 180 Georgia school districts currently maintain with the State Board of Education, reviewed on a bi-annual basis and upon contract renewal.

Competitive Preference Priority 4 – Charter School Facilities

The State of Georgia meets Competitive Preference Priority 4 by providing grants to charter schools through a statewide charter facilities fund created through legislation and access to unused board of education facilities. Title 20 of Georgia Code, <u>The Charter Schools Act of 1998</u>, provides for a facilities fund for charter schools. In § 20-2-2068.2. Facilities fund for charter schools; purposes for which funds may be used; upkeep of charter school property; availability of unused facilities, a fund is established to provide facilities funding to locally-authorized and state-authorized charter schools. In Spring 2022, the Georgia General Assembly and Governor Kemp

approved an additional **control** in the FY2023 budget for Georgia's Charter School Facility Grant fund, bringing the total fund to **control**, with a plan to allocate the funds equitably between charter schools to meet their facility needs. In addition, this law requires local boards of education to make unused facilities available to local charter schools with no-cost leases.

Competitive Preference Priority 5 – Serving At-Risk Students

The State of Georgia can show that it meets the requirements of Competitive Preference Priority 5. Georgia is committed to serving at-risk students and ensuring their success in school and in life. Charter schools throughout Georgia offer specific programs and supports to serve atrisk students, including wrap-around services, social service resources, academic supports, and unique educational models to support trauma-informed learning. GaDOE has created an Office of Whole Child Supports and Strategic Partnerships to assist all schools with addressing the nonacademic needs of their students. GaDOE works with partners and schools to develop a roadmap that engages the community, aligns the goals of the community and the school, coordinates the academic and non-academic supports of students, expands access to academic opportunities and non-academic supports, and transforms schools into community hubs. The Charter School Division of GaDOE and the SCSF work closely with the GaDOE Office of Whole Child Supports and the GaDOE Office of School Improvement to provide support to charter schools by developing toolkits that organize resources, partners, best practices and guides and providing guidance and support on how to leverage federal funding to support the whole child. The SCSF, in particular, is working with the Office of Whole Child Supports to address the mental health, physical health, and nutrition needs of students in need at state charter schools. The SCSF has provided technical assistance, professional development opportunities, donated goods, and grants to charter schools at-risk students.

Georgia has maintained a focus on providing quality options to at-risk and underserved students. Several charter schools are mission-focused on serving at-risk students, such as those at risk of dropping out of high school, immigrant populations, and children from low-income communities. In addition, several charter schools authorized since 2020 follow a culturallyresponsive model to serve students. Many charter schools offer wrap-around services, including partnerships with local organizations like the YMCA and Boys and Girls Club, career coaches, health services, food pantries, libraries, health and wellness centers, mental health services and referrals, and intensive tutoring. Several examples include the following: Mountain Education Charter High School, Coastal Plains Charter High School, Foothills Charter High School, and Skyview Charter High School are all diploma- and credit-recovery high schools; Georgia Fugees Academy was established to provide a supportive educational environment for refugee students; and Tapestry Charter School provides intensive support to children with autism. These charter schools are offering supportive environments that would not be available to these communities otherwise. GaDOE has included alternative credit- and diploma-recovery charter high schools within its federal identification of low-performing schools. This inclusion ensures that these schools supporting at-risk populations are able to access additional funding and support to meet the needs of their students.

Invitational Priority - Collaborations between Charter Schools and Traditional Public Schools or Districts that Benefit Students and Families across Schools

The State of Georgia can show that it meets the requirements of the Invitational Priority. Schools, districts, and state entities in Georgia have demonstrated a desire to collaborate for the greater good of students and communities. Charter schools frequently share resources, programming, facilities, and transportation services with local school districts and other public

schools. Schools such as Mountain Education Charter High School, Coastal Plains Charter High School, and Foothills Charter High School are collaborations between these charter schools and local districts, with local districts providing board leadership, facilities and resources, and funding. They work together to provide diploma recovery programming for at-risk students. In addition, three charter networks now have schools authorized both by the State Charter Schools Commission and local districts, creating new opportunities for collaboration. Charter schools often work with traditional public schools and districts to provide services for students with disabilities, and GaDOE's Georgia Network for Educational and Therapeutic Support offers services for students with behavioral disabilities at traditional public schools accessed by charter school students.

One notable example is underway in Atlanta. Currently, Purpose Built Schools, KIPP, and Kindezi Charter School, nonprofit management organizations, operate previously low-performing schools within Atlanta Public Schools under performance contracts granting flexibility and autonomy, and outlining specific performance requirements. Carver STEAM Academy, managed by Purpose Built Schools, is part of the Carver High School Cluster, and Purpose Built employees work closely with APS employees, students, and families to coordinate instruction and programming to create consistency across the cluster. Similarly, the five other APS partner schools are integrated into the district zones and clusters composed primarily of traditional public schools and serving students Atlanta's most underserved areas.

Three statewide charter schools, Foothills Education Charter High School, Mountain Education Charter High School, and Coastal Plains Education Charter High School, currently provide programs targeting an alternative education population, including credit-and drop-out recovery students. These charter schools are unique in Georgia in many ways, not the least of which is that, although meeting the state requirement of being independent non-profit entities, they

are supported through a collaborative effort of dozens of local school districts. Local school districts collaborate with and support these charter schools by donating time, funding, facilities, and other material forms of support to ensure that the local students attending the schools receive the best in instruction and important supports. The schools and local districts share teachers and curriculum and work closely to identify and support students at risk.

As a part of the Georgia Strategic Charter School Growth Initiative, the co-applicants will prioritize subgrantees that propose a continuation of or creation of collaborations with traditional public schools and/or districts to benefit students and families. Preference will be given to subgrantee applicants that propose collaborations to increase access to charter schools, including those focused on transportation services, free and reduced meals, transparent enrollment practices, or services and resources for students with disabilities or English language learners. Consideration will also be given to subgrantee applicants that propose collaborations to offer professional development opportunities to teachers focused on high-need students, shared curriculum and educational resources, facility sharing, or school safety initiatives.

Selection Criteria

Quality of Project Design

Rationale

The Georgia Charter Growth Initiative is selecting the first cohort of Replication and Expansion Schools and New Charter School Leaders in August 2022. The first round of applications yielded 16 interested schools and 10 full applications. The remaining six potential applicants determined that they either did not need the technical assistance at this time and were ready to proceed with replication or expansion or felt that they were not ready to participate in a cohort program this year. The schools that do not need technical assistance will require funding to

replicate or expand within the next two years. The other schools will be ready to participate in a cohort program and act on their replication or expansion goals within two to three years, within the five-year term of the CSP grant. Six new schools are eligible for participation in the New School Leader Fellowship program, which can accommodate three leaders.

Based on the current Georgia Charter Growth Initiative cohort application process and discussions with charter schools in Georgia, coupled with data from petition submissions and past administration of the CSP grant, the co-applicants believe that the target number of charter schools for Georgia is appropriate. The new approach of supporting both new charter schools and replicating and expanding schools will help Georgia meet its charter school growth goals to serve at least 6,000 new students within five years. The number of subgrantees and cohort participants are based on historical data from the previous CSP grant, number of petitions and charter approvals from around the state, feedback from charter school support entities and funders, and discussions with school leaders and governing boards. In addition, the co-applicants considered the increased demand for charter schools indicated in recent polling and parent feedback sessions held by stakeholder organizations like GeorgiaCAN. The subgrant award amounts were determined based on pre-opening year and year one budgets of recently-opened charter schools in Georgia and represent approximately 60% of start-up costs, dependent on facility expenses and unique educational model. Currently, no other form of philanthropic start-up capital is available for new, replicating, and expanding charter schools in Georgia, and CSP funds are critical to support strategic growth.

 Existing Georgia Strategic Charter School Growth Initiative with partnerships, existing programs, capacity (funded by GEER II) & ability to expand

- Strong statewide authorizing board, charter division of SEA
- Several nonprofits providing effective support for charter schools
- Strong demand for charter schools across the state
- · Highly-effective charter schools seeking to replicate & expand
- Existing technical resources for authorizers & struggling schools
 Charter school communications & outreach plan in place ready for execution
- CSP State Entity Funding

RESOURCES/INPUTS

- Publicize Charter Growth Initiative to charter schools & communities
- Hold community events & info sessions for charter schools & distribute collateral materials
- Complete & launch FindaGaCharter.org
- Identify potential charter schools for replication & expansion & possible new schools
- Finalize all aspects of the initiative
- Select Replication & Expansion cohort participants & subgrant recipients
- Promote authorizer training & manual
- Identify charter school best practices to add to Virtual Toolkit for struggling schools

OUTPUTS

- Schools participate in Replication & Expansion Cohort & New School Leader Fellowship
- · Schools receive subgrants to support school opening/growth
- Awareness of FindaGaCharter.org increases

- Communities participate in charter school info sessions
 Authorizers access authorizer training & manual
- New charter school best practices added to Virtual Toolkit & disseminated to struggling schools



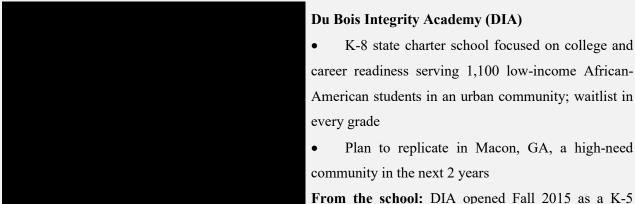
ACTIVITIES

CSP State Entity Logic Model

Short-term Middle-Term Long-Term · Charter schools aware of TA & grant · 32 high-quality charters open, replicated, · 6,000 more Georgia children have access to expanded - 10 in priority communities & 4 charter schools, accessing better educational opportunities Charter schools prepare comprehensive plans high schools opportunities for them for opening/growth 10 schools with increased enrollment interest; · Increased understanding of & demand for More Georgians aware of charter schools & 25% increase in traffic to FindaGaCharter.org; community-centered charter schools available schools 2 petitions in new areas Improved relationships & accountability Authorizers implement improved practices 60% charter authorizers access online training between authorizers & charter schools

- Struggling schools consider best practices to benefit students
 on standar
 20 best practices
 - on standards; 70% authorizers improve rating
 20 best practices added to Virtual Toolkit; 10 struggling schools implement best practices
 - OUTCOMES
- Better outcomes for students at struggling schools

Charter School Profiles – Preparing to Replicate



Du Bois Integrity Academy (DIA)

• K-8 state charter school focused on college and career readiness serving 1,100 low-income African-American students in an urban community; waitlist in every grade

Plan to replicate in Macon, GA, a high-need • community in the next 2 years

elementary school in Riverdale, GA. When the school opened, the recruited student population scored dismally in state assessments its first year with over 60% of students scoring Basic and below in core content areas. With a committed educational plan in place and highly trained administrators and teachers who are deeply committed to continuous improvement, by 2017, DIA was recognized by the Governor's Office of Student Achievement as a high performing charter school receiving the "Beating the Odds" state designation for student achievement and growth. The same year, DIA scored in the top 10% of all public schools in Georgia in student achievement growth.

Tybee Island Maritime Academy (TIMA)

- K-8 locally-authorized charter school focused on place-based learning & maritime education in a coastal community serving 450 students; 250 students on waitlist
- Plan to replicate in the next 5 years in a similar coastal community & expand into high school

From the school: One of our most defining features is the school's use of the local environment to enhance



learning. Using projects aligned to the local topography, community, and economy with a balance of selfdirection and teacher-led cross-curricular instruction, students gain a deep sense of mastery across academics, critical thinking, collaboration, and problem-solving. Because of this integration, students see first-hand how their classwork relates to life around them. Furthermore, the students are natural candidates to create a pipeline for maritime careers, helping sustain and grow the local economy. TIMA is deeply supported by the local community. Prior to TIMA opening, there were no public (since 1988) or private (since 2010) education opportunities on Tybee Island.

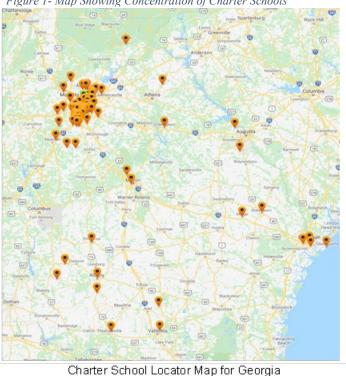


Figure 1- Map Showing Concentration of Charter Schools

Demand and Need

Across Georgia, families value having choice in their child's education, and demand for choice options has increased significantly during the pandemic. This sentiment was captured in a Cygnal poll of Georgia families in August 2020, designed to capture public opinion of charter schools and choice options during the height of the pandemic (Georgia Charter Schools Association, 2020, September 10). In the poll, 52 percent of Georgia parents who responded said they

wanted additional free public school options. The creation of more public school options was especially important to low and middle-income Georgians. Fifty-four percent of respondents who made less than \$50,000 annually and 58 percent earning between \$50,000-\$90,000 indicated that more free public school options were needed. Both Democratic (55%) and Republican (51%) voters agreed that more public school choices were necessary.

Georgia's families across the state want more public school choices to meet the needs of their children. However, most charter schools in Georgia are located in the Greater Atlanta area, with a particular concentration within the City of Atlanta. Many regions in the state have no community-based public schools of choice, and entire regions of the state do not have a single charter school present. A map from the Georgia Charter Schools Association, which includes locally-approved charter schools and schools authorized by the SCSC, shows the concentration of charter schools in the Atlanta area and vast areas without any charter options (Georgia Charter Schools Association, n.d.).

In the 2020-2021 school year, nearly 60,040 students attended 90 charter schools in Georgia. Of those students, 70 percent were children of color, and over half came from low-income families. Over 28,000 students were elementary students, over 16,000 were middle school students, and just over 10,000 were high school students. More than 14,000 students were on the waiting lists of these charter schools, demonstrating a strong unmet demand. Parents also expressed their desire for more middle and high charter school options. Demand for charter schools continues to grow. Four new schools will open Fall 2022, but only one school, a virtual option, offers high school. Although the three new brick and mortar schools are not located near other charter schools, they are located in areas that have charter schools within a 20-mile radius.

Benefits of Charter Schools in Georgia

Supporting the creation, replication, and expansion of high-quality charter schools in Georgia can offer significant benefits not just for individual students and families but also communities. Charter schools often have a significant impact on the local economy while they offer families new choices for their children's education. A series of recent research reports published by the Center for State and Local Finance at Georgia State University's Andrew Young School of Policy Studies highlights the significant economic benefits of charter schools on both communities and students across the state. In their 2017 study, "The Effect of Start-Up Charter Schools on Nearby Property Values," researchers found that Georgia communities served by one or more charter schools experienced increased property values, improved post-secondary earning potential of graduates, better graduation rates, and lowered rates of incarceration (Bluestone et al, 2017). These benefits were evident in urban, suburban and rural settings, and the impact was more

or less pronounced based on the proximity of a home (or a student) to a charter school (with the most significant benefit observed in areas located within a 0.3 mile radius of the charter school). In the Atlanta-area alone, charter schools increased property values by 8.2% within a 0.3 mile radius, with the average home expected to sell for \$11,846 more than the same home 0.3 - 0.6 miles away. In the Atlanta suburbs, charter schools increased property values by 4.2% within a half-mile radius, with the average home expected to sell for \$5,888 more than the same home located a half mile to one mile away.

An additional study titled "The Effects of Start-Up Charter Schools on Academic Milestones" (Bluestone & Warner, 2018) identified a strong relationship between start-up charter school attendance and the achievement of critical academic milestones often linked to future labor

ble 1- Evidence of Charter School Impact on Milestones						
Treatment and Control Cohort and Milestones Attained – 2018 Report						
8th Grade Cohort	Control*	Treatment**	High School Grad. 5 yrs.**			
2007	694	141	65%	57%		
2008	1,223	114	62%	53%		
2009	1,263	210	69%	57%		
2010	1,976	449	56%	45%		
2011	1,372	712	70%	52%		
2012	2,267	1,072	56%	NA		
*Control are 8th grade start-up charter school students that go on to attend a traditional public school or conversion charter school for 9th grade. **Treatment are 8th grade start-up charter school students that go on to attend a start-up charter high school for 9th grade.						

market success. Specifically, the study compared start-up charter school students in Georgia with those who previously attended a start-up charter school but switched to a traditional public school in ninth grade. Of those two

groups of students, start-up charter school pupils were four percentage points more likely to graduate from high school, six percentage points more likely to enroll in college, eight percentage points more likely to persist in college for two consecutive semesters, and 2 percentage points more likely to earn a college degree or certificate.

Bluestone and Warner reexamined the data in 2021, and they found more striking results from charter school attendance. They discovered that students attending charter schools were seven percentage points more likely to graduate from high school, nine percentage points more likely to enroll in college, and six percentage points more likely to earn a college degree. In addition, students who attend a start-up charter school in 9th grade are likely to earn \$538 in additional wages per quarter (Bluestone & Warner, 2021). An overarching finding in the new report issued in 2022 is that charter school results improve as charter schools are open longer. Therefore, it is essential that charter schools have the resources and technical assistance they need to build as firm a foundation as possible when planning to grow or create a new school. The Charter Growth Initiative seeks to prepare charter schools for delivering strong results from the start.

Academic Recovery Shown in Assessment Results

Newly-released reports of student and school performance on the 2022 Georgia Milestones Assessment, the mandatory statewide summative assessments for all public schools in the state, show that state charter schools (schools authorized by the SCSC) have recovered student achievement faster than other public schools in the state. The assessments test students on the Georgia Standards of Excellence in English Language Arts and Math every year in grades 3-8 and in several subjects in high school. Scores are grouped into four categories of learners: Beginning, Developing, Proficient, and Distinguished. On average, state charter school students have recovered to near or above pre-pandemic performance levels in the upper elementary grades in math and ELA, whereas the state has been slower to recover. Also, on average, SCSC students within the high school grade band have recovered to near or above pre-pandemic performance levels on End of Course exams, whereas Georgia high school students on average have not yet fully rebounded from the impacts of the pandemic. A majority of state charter schools are outperforming the district in which they are located. Seventeen of 28 (61%) of state charter schools serving elementary grades had a higher percentage

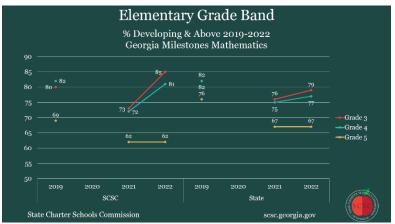


Figure 3- State Charters Compared to State - Elem Math

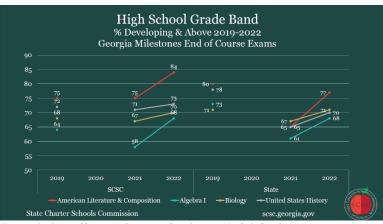


Figure 3- State Charters Compared to State - High School

of students scoring at developing learner and above, in both ELA and Math. Eighteen of 29 (62%) of charter schools serving state middle grades had a higher percentage of students scoring at developing learner and above, in both ELA and Math. Eight of 15 (53%) of state charter schools serving high school grades had a higher percentage of students scoring at developing learner and above in Algebra, American Lit., Biology, and US History.

Barriers to Replication and Start-up Charter Schools

Many charter schools in Georgia have demonstrated strong results and effective instruction, utilizing innovative educational approaches. The SCSC has observed that established schools are typically more successful at opening a new school than a group that has no charter school experience. For this reason, the SCSC encourages high-performing charter schools to consider replication and established an expedited replication petition application process. However, schools frequently do not have the capacity to open an additional campus. The following are the barriers cited most often:

- 1. Lack of funds and staff capacity to initiate a plan for replication;
- 2. Lack of funds to hire an additional school leader;
- 3. Lack of a facility or expertise to select a new school community; and
- 4. Lack of experience in managing multiple campuses.

Many parts of the state do not have a single charter school available for families, and it is unlikely that current charter schools will be able to replicate in locations that are far from their current location. Charter schools are most successful when the community they serve is involved in their creation. Groups of residents and community leaders often do not know how to start a charter school, gain the expertise they need, or find needed funding.

The COVID-19 pandemic has exacerbated the situation for any new charter school, making it more difficult and more costly for new schools to plan, prepare, and open on time. The Charter Growth Initiative seeks to break down barriers to facilitate the opening of more high-quality charter schools.

Additional Barriers for High Schools and Rural Schools

Charter high schools and rural charter schools face additional challenges when starting up, replicating, or expanding. The QBE funding formula in Georgia provides the least amount of funding for high school students. Therefore, it is more difficult for charter schools to budget appropriately for brand-new charter high schools, especially if the school has high facility expenses. High schools must provide a wide range of course selections and offer access to Georgia's Career Pathways. It is difficult for schools to offer a robust course catalog when their

enrollment starts small and funding is more limited. In addition, charter high schools face additional expenses for providing extracurricular and athletic opportunities for students and ensuring that they have adequate facilities.

Rural charter schools can face other challenges. Although land is typically less expensive, it is less likely that a rural charter school will identify an existing facility that can be used as a school building. So, rural schools often must purchase land, utilize temporary buildings, and secure the financing to build a facility from the ground up. Rural schools also typically do not have ready access to professionals who can assist with new school development and are not eligible for philanthropic funding that is usually geared towards urban communities. Finally, rural schools usually have students attending from varying distances, making transportation support both more critical and more difficult. Most rural charter schools in Georgia are K-12 community-based schools, and they require additional support and funding to start off strong.

Project Design and Implementation

Objective 1: Support the replication, expansion, or creation of 32 high-quality charter schools that are responsive to community need in Georgia with technical assistance and grants, including a new school leader fellowship and a replication cohort program.

SMART Goal 1.1: Open, expand, or replicate at least 32 high-quality charter schools in Georgia by 2027.

SMART Goal 1.2: At least 10 charter schools will be located in rural communities or SCSC priority communities.

SMART Goal 1.3: At least 4 schools will open a new charter high school, replicate into high school, or expand into high school.

Activity	Performance	Performance Target
	Measure	
Identify &	School Data	Y1-5: Review performance data and track record of all charter
recruit	Review &	schools using Georgia College and Career Ready Performance
schools for	Identification	Index (CCRPI) and SCSC Comprehensive Performance
participation		Framework (CPF) to identify potential candidates for replication
in Georgia		and expansion

Charter		Y1-5: Review charter petition approvals for potential new school
Growth		candidates
Initiative		
	Coordination	Y1-5: Provide information about Georgia Charter Growth
	with Partners	Initiative and subgrants/TA to charter school organizations and
		partners for wide dissemination
		Y1-5: Co-applicants send emails through email lists to schools
		and stakeholders about opportunities
	Informational	Y1-5: Hold at least 2 virtual informational meetings about the
	Meetings	Georgia Charter Growth Initiative for prospective schools
	6	Y1-5: Hold at least 4 in-person meetings in priority communities,
		including rural communities and charter middle schools (discuss
		high school)
	Website	Y1-5: Post all information about the Georgia Charter Growth
		Initiative on the FindaGaCharter.org website, including grant and
		TA opportunities
Prepare	New Start-up	Y2-5: At least 2 new approved schools participate in the New
high-quality	Charter School	School Leader Fellowship program
charter	Support	Y1-5: At least 2 new approved schools receive subgrants
schools for	11	Y1-5: At least 2 grant TA sessions held virtually
successful	Replication	Y2-5: At least 4 existing high-quality charter schools participate
launch or	and Expansion	in Replication & Expansion cohort program
growth	Support	Y1: At least 1 school receives subgrant to support replication
		Y2-5: At least 2 schools receive subgrant to support replication
		(after approval)
		Y1-5: At least 2 schools receive subgrants to support expansion
		(after approval)
Administer	Subgrant	Y1-5: Georgia Charter Growth Initiative "fully" or "largely"
CSP	Administration	meets all indicators on ED CSP Monitoring Report
subgrant		Y1-5: Grants are allocated fairly and appropriately, payments are
program		made expeditiously and accurately, and all financial reports are
with fidelity		completed on time and reconciled
	Subgrantee	Y1-5: 100% subgrantees are aware of federal programs for which
	Participation	they are eligible and are able to participate
	in Federal	Y1-5: 100% of subgrantees receive commensurate share of
	Programs	federal funds for which they are eligible and elect to receive
	Avoidance of	Y1-5: 90% of subgrantees agree that the subgrant process is
	Duplication of	efficient, accurate, and timely, avoiding duplication in the
	Work	submission process
		Y1-5: 90% of subgrantees agree that they are not required to
		provide the same reports or information related to the subgrant to
		more than one entity

The Georgia Charter Growth Initiative has developed a comprehensive approach to encouraging the creation, replication, or expansion of high-quality charter schools in Georgia to serve more children throughout the state by providing training, support, and grants. The Georgia Strategic Charter Growth Initiative provides schools and charter school networks (less than five schools) with the necessary tools and resources to pursue replication or expansion in high-need communities through two different tracks: Replication and Expansion and Start-up Charter School. The co-applicants have designed the Georgia Charter Growth Initiative based on feedback from charter schools, charter support organizations, funders, communities, and other stakeholders. Based on this feedback, observations by the SCSC, GaDOE, and the SCSF, and lessons learned from the previous CSP grant, the new initiative supports replicating and expanding schools in addition to start-up charter schools. The coalition believes that the greatest growth will occur with existing high-quality charter schools that are already embedded in Georgia communities.

Replication and Expansion Track

The Replication and Expansion Track is designed for highly-effective charter schools with the intent and capacity to submit a petition for a replication charter or request for expansion within the next three to five years. In this intensive 15-month program, charter school leadership will complete the steps necessary to open a new school campus or expand the existing campus for vertical (additional grade band) or horizontal (more seats) growth by the end of the five-year grant period. This track includes the following components:

• Cohort program leading to long-term growth plan development with Bellwether Education Partners (or other firm) to strengthen and/or adjust the educational model, develop a plan for sustainable growth, determine the appropriate governance structure for a growing entity, plan for staffing and leadership, scale appropriately, and learn from best practices.

- Participation in GCSA's Incubator Program to receive training on Georgia and SCSCspecific requirements; one-on-one coaching; and completion of a Landscape Analysis, Community Engagement Plan, Enrollment Plan, and replication charter petition or request for expansion to be submitted to a local board of education or the SCSC.
- Support from GCSA's Charter Facility Center to complete a Facility Plan, identify financing options, and locate a facility.
- Supplemental support and training from the SCSF and SCSC.
- A grant up to upon approval for an expansion of at least 150 seats; up to for expansion into high school; up to for charter petition approval for replication; up to for charter petition approval for replication in a rural community; and up to for charter petition approval for replication for a high school to be used for pre-opening activities, supplies, and materials to support the growth effort. In addition, replicating schools may be eligible for a planning grant for the year prior to the opening of the replicated school.

Start-up Charter School Track

The Start-up Charter School Track is designed for schools that have received charter petition approval and are in the year (or two years) prior to school opening. In this intensive 15-month program, new charter school leaders will complete the steps necessary to open a new school campus successfully. This track includes the following components:

• Participation in the New School Leader Fellowship program provided by Lead with Excellence to develop specific plans for academics, management, school culture, community engagement, personnel management, and scheduling.

- Supplemental support and training from the SCSF and SCSC.
- Stipend of for the school leader to devote their time fully to opening the school successfully.
- A grant up to **a second for charter petition approval; up to a second for charter petition** approval in a rural community; and up to **a second for charter petition** approval for a high school to be used for pre-opening activities, supplies, and materials to support the growth effort.

Outreach for Applicants

The SCSF, in collaboration with its partners, will engage in extensive outreach activities to encourage participation in the Charter Growth Initiative, including online marketing, informational sessions, and communication with schools, parent organizations, and partners throughout the state. All opportunities will be posted prominently on the official website for the Charter Growth Initiative, FindaGaCharter.org, and will be distributed via charter school listserv groups and partner organizations.



The partners will use available data, including CPF results (SCSC accountability matrix for state charter schools); annual financial audits and GaDOE's Annual Report and bi-annual review documents for governance, operations, and financial indicators of success; and GaDOE's CCRPI scores, to identify potential charter schools for replication. Data will be considered from schools' entire charter term, and both locally-approved (local) and state-commissioned (state) charter schools will be considered.

SubGrants without Participation in Cohort Program

In some cases, schools may not require technical assistance or the cohort program to achieve success because they have completed the necessary planning work outside of the Charter Growth Initiative. In those cases, schools will be considered on a rolling basis for competitive grants to support replication, expansion, or charter school creation up to depending on the grades served and location of the school.

Basis for Program Design

The Georgia Strategic Charter School Growth Initiative is modeled after the Texas Charter Schools Association's Replicating Great Options program, which provided a fellowship program and programmatic supports to charter schools seeking to expand their network with additional school campuses. The Charter Growth Initiative also draws on the recommendations in the National Association of Charter School Authorizers' Replicating Quality (2014, January). The initiative leverages the existing highly successful Incubator Program at the Georgia Charter Schools Association and the GCSA's Facility Resource Center.

The first cohorts for the Georgia Charter Growth Initiative, as funded by a GEER II grant, are being selected at the time of this application (August 2022). If funded by CSP, the second cohort groups will be selected by June 2023 to begin Fall 2023.

Objective 2: Educate and engage communities across Georgia about charter schools with convenings and a comprehensive charter school website (FindaGaCharter.org).

SMART Goal 2.1: At least 10 charter schools will report increased enrollment interest and/or applications from charter school communications efforts.

SMART Goal 2.2: Traffic to FindaGaCharter.org will increase by at least 25% a year after the first year, as measured by Google Analytics.

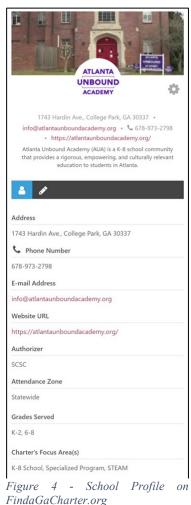
SMART Goal 2.3: At least 2 new communities without a charter school within 20 miles will have charter petitions submitted.

Activity	Performance	Performance Target	
·	Measure		
Educate	Informational	Y1-5: Hold at least 2 virtual informational meetings about the	
communities	Meetings	charter schools for communities and parents	
about		Y1-5: Hold at least 4 in-person meetings in priority communities,	
charter		including rural communities and meet with stakeholders	
schools and	Coordination	Y1-5: Hold at least 2 charter sector meetings with charter school	
engage with	with Partners	support organizations to coordinate efforts in communities and	
them about		share information to best meet community need	
local needs	Collateral	Y1-5: Distribute collateral materials at least 2 community events	
	Materials	to direct people to FindaGaCharter.org	
	materials	Y1-5: Distribute collateral materials to at least 10 school	
		communities to direct people to FindaGaCharter.org using the	
		tagline "I love my GA charter school!"	
	Website	Y1-5: Maintain accurate and up-to-date about Georgia charter	
		schools on the FindaGaCharter.org website, including a	
		comprehensive, searchable school locator	
		Y1-5: Give charter schools access to provide information on their	
		school profiles on FindaGaCharter.org and offer at least 2 virtual	
		training sessions on using the site	
Engage with	Op-eds in	Y1-5: At least 1 op-ed written by a local charter school family or	
the media to	Local	community member published in a local newspaper	
produce	Newspapers	Y1-5: At least 2 new approved schools receive subgrants	
accurate,		Y1-5: At least 2 grant TA sessions held virtually	
compelling	Stories about	Y1-5: At least 2 stories about locating charter schools in Georgia	
stories and	Locating	or positive charter school stories published in local, statewide, or	
information	Charter	national publications or newsletters	
about	Schools in		
charter	Publications		
schools			

In addition to the services provided to facilitate new charter school creation and school expansion, the Charter Growth Initiative includes a communications campaign to educate

Georgians about high-quality charter schools as a public school option. The Charter Growth Initiative will consolidate information in one central website to increase knowledge and understanding. The new website, FindaGaCharter.org, is intended to be a "onestop-shop" for parents and communities to learn about charter schools and a site for the applicants to post all information about the Charter Growth Initiative, including grant and technical assistance opportunities and reporting. The applicants will hold in-person and virtual informational sessions about charter schools around Georgia, particularly in the SCSC's priority communities, to inform the public, engage with communities, and solicit feedback about the initiative and needs for charter schools.

The public-facing website, <u>FindaGaCharter.org</u>, which is currently in development and scheduled to launch September 1, 2022, will feature FAQs for parents and communities, information



about the Charter Growth Initiative, resources for charter schools and authorizers, and a searchable charter school locator that includes every charter school in Georgia and allows schools to provide real-time updates. The website will be the definitive website for charter school information Georgia, and charter schools will have access to a secure portal to submit changes to their school information and upload photos and information about special events and enrollment. The SCSF will manage the website and will provide training and technical assistance to charter schools on

using the site.

Objective 3: Promote consistent, quality charter school authorizing by providing technical assistance to authorizers, engaging in evaluations of practices, and supporting the Georgia Principles and Standards for Charter School Authorizing.

SMART Goal 2.1: At least 60% of charter school authorizers will access online training modules related to quality charter school authorizing.

SMART Goal 2.2: At least 70% of charter school authorizers will maintain high ratings or improve their rating on the authorizer evaluations.

Activity	Performance	Performance Target	
	Measure		
Support	Training	Y1-5: Provide access to online authorizer standards training	
quality	Modules &	modules to all charter school authorizers in Georgia and send	
charter	Manual	reminders and updates at least quarterly	
school		Y1-5: Hold at least 2 live virtual sessions on using the training	
authorizing		modules and other topics related to charter school authorizing	
across		Y1-5: Update and distribute the Authorizer Manual at least once	
Georgia		to authorizers	
	Coordination	Y1-5: Establish charter school authorizer evaluation and	
	with Technical	coordinate with outside provider to evaluate authorizers	
	Assistance	Y1-5: Provide at least 2 training opportunities for charter school	
	Providers	authorizers about the evaluation process	
	Communication	Y1-5: Provide information to charter schools about authorizer	
	with Charter	evaluation in one recorded session	
	Schools	Y1-5: Send at least 4 emails to charter schools about the	
		authorizer evaluation process and schools' options if authorizers	
		do not meet standards	
	Website	Y1-5: Maintain a link to the authorizer standards and information	
		about the authorizer evaluation process on FindaGaCharter.org	
		Y1-5: Maintain the current copy of the Authorizer Manual on	
		FindaGaCharter.org	

As part of the implementation of Georgia Standards for Quality Authorizing, GaDOE has contracted with NACSA to provide a series of eight online training modules based on the standards and on NACSA's Principles & Standards. These authorizer training modules were created in coordination with GaDOE staff and adjusted to reflect feedback provided by trainees on an ongoing basis. Modules include a trainee quiz component, the results of which provide additional opportunities for course correction and focus on areas of particular need. Additionally, GaDOE staff discuss module content with local authorizers at bi-monthly authorizer meetings to ensure clear expectations and access to tools authorizers need to implement strong practices.

GaDOE will utilize CSP grant funds to continue using the NACSA authorizer modules as an ongoing training tool, both for onboarding new local districts and GaDOE staff and for remediating challenges uncovered in the annual authorizer-standards-based performance evaluation. GaDOE and the SCSC will provide guidance to local charter school authorizers on reducing the reporting burdens on charter schools and reducing duplication of reporting, including how to utilize data available through the GaDOE instead of requiring it from charter schools. The Authorizer Manual developed by GaDOE will be used to educate local districts on charter school authorizing and to encourage community-based local authorizing.

Objective 4: Disseminate charter school best practices and offer additional support to highneed public schools, including charter schools and local district schools, with an emphasis on supporting TSI, ATSI, and Promise schools.

SMART Goal 2.1: At least 20 new best practices from charter schools will be added to REL-SE Virtual Toolkit to support struggling schools.

SMART Goal 2.2: At least 10 struggling schools will access the Virtual Toolkit to identify best practices to improve their school community.

Activity	Performance	Performance Target	
	Measure		
Collect	Collection of	Y1-5: Identify at least 4 best practices at charter schools that are	
charter	Best Practices	especially impactful for high-need students related to wellbeing	
school best		and/or academic achievement	
practices &		Y1-5: Document at least 4 charter school best practices with	
disseminate		sufficient detail for other schools to replicate the practices	
them widely	Maintain and	Y1-5: Maintain the RE-SE Virtual Toolkit with existing best	
with an	add to the RE-	practices and add at least 4 best practices per year	
emphasis on	SE Virtual		
struggling	Toolkit		
schools	Training on the	Y1-5: Provide at least one virtual session on accessing and	
	RE-SE Virtual	utilizing the RE-SE Virtual Toolkit to designated struggling	
	Toolkit	schools	

Through GaDOE's partnership with Research Education Laboratories (REL-SE), best practices from charter schools across Georgia will be collected, analyzed, and cataloged. All best practices will be made available to charter schools and all TSI, ATSI, and Promise schools (designated struggling schools) through an online virtual toolkit. In addition, GaDOE will collaborate with the GaDOE Office of School Improvement to provide professional development to identified schools and districts on the best practices identified through the REL-SE partnership. Schools will receive access to the virtual toolkit and technical assistance on accessing and utilizing the best practices.

The SCSF will gather information and best practices from state charter schools related to its Schools of Wellness Initiative, which seeks to provide mental health services and wellness support to faculty, staff, and students. Since mental health has been identified as a significant challenge for schools, all activities will be tracked and outcomes recorded to identify best practices. These will be shared with GaDOE to include in their efforts to disseminate best practices to struggling schools and districts.

Quality of Eligible Applicants Receiving Subgrants

Methods of Evaluation

A total of up to 32 schools will be selected to participate in the Georgia Strategic Charter School Growth Initiative. Selected applicants will be a mixture of new schools, replicating schools, and expanding schools. Participants will participate in a cohort-style technical assistance program as a condition of receiving subgrants. The co-applicants will manage an impartial, equity-based approach to the selection process, and decisions will be made by the Charter Growth Selection Committee, made up of representatives from the SCSF, GaDOE, and SCSC. The SCSF, GaDOE, and SCSC will each approve all subgrant awards. Schools will be invited to participate in the Replication and Expansion cohort program or New Charter School Leader cohort program prior to receiving CSP subgrants to ensure that they are adequately prepared for a successful school opening, expansion, or replication. Upon meeting milestones for the cohort programs, schools will be eligible for grants.

Table 1 Subgrantees by Year

Yea	ar 1	Yea	ar 2	Yea	ar 3	Yea	ar 4	Yea	ır 5
Ν	R/X	Ν	R/X N R/X		Ν	R/X	Ν	R/X	
2	4	2	4 2 5 2 4 2 5						
N=New Start-up Charter Schools, R/X=Replication or Expansion Charter Schools									

Schools will be considered for subgrants without participation in a cohort program if they have already secured a petition for a new or replicated school or expansion from a charter school authorizer and demonstrate a sound financial model, academic program, management plan, and governance structure; or they are participating in another recognized charter school support or school leader fellowship program (at the discretion of the Selection Committee).

Mandatory Criteria for all Subgrant/Cohort Applicants

- Nonprofit governing structure with approved charter petition
- Applicants must describe the steps school has taken or will take to ensure it will not hamper, delay, or negatively impact desegregation efforts, and will not increase racial or socioeconomic segregation/isolation in the schools from which students are drawn.
- Racial and Socio-economic Diversity All applicants must present a plan to establish and maintain a racially and socio-economically diverse student population and endeavor to recruit faculty and staff who are similarly diverse. If an applicant is proposing a location in a segregated/isolated community and/or offers a culturally-responsive educational model, this requirement may be waived at the discretion of the Selection Committee.

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- Applicants must agree to hold or participate in a public hearing in the local community
 which shall at least include how the proposed charter school will increase availability of
 high-quality options for underserved students, promote racial and socio-economic
 diversity, or have an educational mission to serve primarily underserved students and not
 increase racial or socio-economic segregation or isolation in the schools from which the
 charter school draws. Schools should engage current and former educators in the process.
- If, at any point, the charter school applicant, during the application phase or as a subgrantee, enters into an agreement with a for-profit educational management organization (EMO/CMO), the school must disclose the terms of the contract, relationships, and the provisions ensuring the charter school board's independence and contract severability from the EMO/CMO. In addition, all information must be provided to the authorizer and receive authorizer approval.
- Applicants must provide a plan for recruiting and enrollment that welcomes all students and eliminates barriers to enrollment for educationally disadvantaged students, including foster youth and unaccompanied homeless youth, and supports student retention and discipline practices that do not remove students from the classroom.

Priorities for all Subgrant/Cohort Applicants

- Applicants planning to locate in a rural community or one of the <u>SCSC's geographic</u> priority areas
- Applicants planning a high school
- Applicants planning a collaboration with a local public school or district to share resources and/or otherwise serve vulnerable populations in coordination

Replication and Expansion Track

The SCSF will accept applications for the Replication and Expansion Track of the Charter Growth Initiative through an electronic submission process. The application will align with the existing Georgia Charter Growth Initiative application and GCSA Incubator application. The application will gather information about the school's model, successes, lessons learned, stability of leadership, capacity for pursuing replication, and community of interest for a new campus. Schools will be required to identify one or more target locations. Schools will also be required to commit to community engagement activities to involve local stakeholders in the planning and opening/expansion of the school.

Applicants will be required to participate in an interview conducted by the Georgia Charter Growth Selection Committee. The committee will ask questions, request additional information, and gauge the interest level of the applicant school during the interview. The committee will review all applications and information presented in the interviews to make selections based on the quality of the application and likelihood of replication success.

Selection Criteria

Replication or Expansion Mandatory Criteria

- Nonprofit governing structure in good standing with charter school authorizer with a history of at least three years of operation;
- Demonstrated academic performance, meeting expectations for the SCSC's Comprehensive Performance Framework for academics or otherwise demonstrating performance at least as good as the schools where charter schools students would otherwise attend based on attendance zone or the state average;

- Demonstrated fiscal accountability with approved budget following required budget processes and meeting district requirements and GaDOE accountability measures or SCSC Comprehensive Performance Framework for operations;
- Demonstrated history of serving students with disabilities in accordance with IDEA requirements and Georgia law regarding serving children with disabilities, considering the percent of students receiving Special Education and related services, and English language learners; and
- Demonstrated compliance with Open Meetings and Open Records requirements. Applicants must describe the steps school has taken or will take to ensure it will not hamper, delay, or negatively impact desegregation efforts, and will not increase racial or socioeconomic segregation/isolation in the schools from which students are drawn.

Other Criteria

- Responsiveness to community need Applicant should provide evidence of community engagement and outreach. Applicants proposing to expand or replicate in an area of high charter school concentration must demonstrate community need for the unique model.
- Growth mindset Applicants should demonstrate their intent to expanding (number of seats and/or additional grade band) or replicating (opening a new school based on the existing model) within the next 2-3 years. Priority will be given to schools currently eligible to expand or replicate through their authorizer or the State Charter Schools Commission of Georgia (if a local authorizer). Applicants should also express their willingness to engage in open, transparent conversations with technical assistance providers and to welcome feedback with an open mind.

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- Commitment Applicants must demonstrate their willingness to devote at least 5 hours per week to meetings, convenings, and "homework." Applicants must agree to attend one out-of-state convening and pay for travel expenses. Applicants must designate a primary contact who will be responsible for attending in-person convenings, traveling to other schools, and communicating with technical assistance providers. Applicants must adhere to conditions of any grant awards prior to receiving grant funding.
- Readiness Applicants must demonstrate their readiness to plan for and implement expansion or replication. The evaluation team will review current and historical academic and operational performance, eligibility for expansion or replication, and mitigating factors. This cohort program is intended to support schools are various stages of readiness, but the applicant should demonstrate a thought-out initial plan.
- Needs Analysis All applicants must present a comprehensive needs analysis as a part of their application demonstrating local support, benefits to the community, evidence of the demand, and demographic projections (supporting a new charter school). Applicants will be rated based on the completeness of their analysis, benefit to the local community, and likelihood to achieve enrollment goals.
- Racial and Socio-economic Diversity All applicants must explain how they will establish
 and maintain a racially and socio-economically diverse student population and endeavor to
 recruit faculty and staff who are similarly diverse. If an applicant is proposing a location
 in a segregated/isolated community and/or offers a culturally-responsive educational
 model, this requirement may be waived at the discretion of the Selection Committee.

Note: Acceptance into the Georgia Charter School Growth Initiative does not guarantee a charter contract from a local board of education or the SCSC. All schools will be required to follow authorizers' established charter petition process, and charter contract execution is contingent upon approval by a local board of education or the SCSC. Existing charter schools with a track record of effectiveness will be eligible to participate in the SCSC's streamlined "replication charter petition" process.

New Charter School Track

Applications will be accepted for the Start-up Charter School Track of the Charter Growth Initiative through an electronic submission process from groups with approved charter school petitions for the year prior to the school's scheduled opening. The application will ask about the school's approved model, existing resources, governance structure, and needs. Applicants will be required to participate in an interview conducted by the Charter Growth Selection Committee. The committee will ask questions, request additional information, and gauge the interest level of the applicant group during the interview. The committee will review all applications and interviews to make selections based on the quality of the applicants and likelihood of success.

Selection Criteria

- Responsiveness to community need Applicant should provide evidence of community engagement and outreach. Applicants proposing to establish a school in an area of high charter school concentration must demonstrate community need for the unique model.
- Growth mindset Applicants should demonstrate their intent to open a school within 1-2 years. Applicants should express their willingness to engage in open, transparent conversations with TA providers and to welcome feedback with an open mind.

- Commitment During Phase I technical assistance, applicants must demonstrate their willingness to devote at least 5 hours per week to meetings, convenings, and "homework." Applicants must agree to attend one out-of-state convening and pay for travel expenses. During Phase II technical assistance, applicants must designate a primary contact who will be responsible for attending in-person convenings, traveling to other schools, and communicating with technical assistance providers. Applicants must adhere to conditions of any grant awards prior to receiving grant funding.
- Needs Analysis All applicants must present a comprehensive needs analysis as a part of their application demonstrating local support, benefits to the community, evidence of the demand, and demographic projections (supporting a new charter school). Applicants will be rated based on the completeness of their analysis, benefit to the local community, and likelihood to achieve enrollment goals.

Priority Communities

Applicants will be encouraged to locate their new campus in one of the SCSC's priority communities. Priority communities include the following: communities with no other charter schools serving the same grade band in a ten-mile radius, including rural communities; census tracts designated as low-income; communities with low-performing public schools according to CCRPI; and areas outside of Greater Atlanta. Schools located in a priority area or offer high school will be eligible for additional grant funds. All schools are required to engage in a community needs analysis and demonstrate ongoing meaningful engagement with the community.

Ambitiousness of Objectives

The co-applicants have established reasonable, attainable objectives to encourage measured, strategic charter school growth in Georgia and further integrate charter schools into the

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overall public school landscape in the state. Subgrant awards, charter school growth, and other objectives were determined based on an extensive review of available data and the first-hand experience of the co-applicants working with schools across Georgia. The co-applicants have come together to combine their collective strengths and have the greatest impact on charter schools and communities. Three substantial changes differentiate this CSP State Entity proposal from Georgia's previous CSP grant. First of all, the co-applicants are proposing the continuation and expansion of a current initiative that is financially supported by the GEER II fund, as awarded by the Office of the Governor. The Georgia Strategic Charter School Growth Initiative has already been established, with a model for tying technical assistance to subgrants to provide schools with the comprehensive support they need for success. The Georgia Charter Growth Initiative is wellsupported by charter schools and support organizations, and a well-organized coalition, programs, and management systems are already in place. CSP funds will allow the initiative to expand its reach and continue to impact charter schools for five years, creating a lasting impression on public education in Georgia. Secondly, this CSP proposal includes subgrants for replication and expansion efforts in addition to just new start-up charter schools. Many schools have indicated to the SCSC and GaDOE that they would pursue replication or expansion if funds were available. Finally, the co-applicants have named the SCSF, a nonprofit organization, the fiscal agent for this grant. As an independent nonprofit, the SCSF can issue grant funds more expeditiously and with less duplication of efforts. Furthermore, the SCSF can remit payment directly to charter schools instead of through local district authorizers, further expediting the process.

State Plan

Adequate Monitoring of Eligible Subgrant Applicants

Georgia will monitor eligible subgrant recipients using a multi-pronged approach. The SCSF and SCSC will provide technical assistance to state charter schools through guidance and recorded webinars on the monitoring requirements of the grant during the grant application phase. Subgrant applications will include the monthly monitoring plan that will be provided by the SCSC and the SCSF. The SCSC and the SCSF will provide training on the grant monitoring cycle, monitoring expectations, and timelines and procedures for addressing any identified risks and deficiencies to eligible state charter schools. The SCSF will compare the submitted budgets of eligible state charter grant recipients against expenditures to ensure the eligibility of purchases before those expenditures are processed through the SCSF's payment system by the Program Coordinator. Grant expenditures will be reviewed and discussed at monthly meetings with GaDOE, SCSF, and SCSC team members.

For all charter school subgrant recipients, a team of SCSF and SCSC staff members will visit each grant recipient bi-annually to interview them, assess grant progress and procedures, and discuss opportunities for support and assistance for program and school success. These biannual monitoring visits will focus on the subgrantee's ability to provide quality education and supports to at-risk students, including students from low- income communities, students with disabilities and English Learners.

Deficiencies and risks identified through the monitoring procedures will be addressed with subgrant recipients in the monthly monitoring calls and/or bi-annual visits. The SCSC will provide the subgrant recipient with written notification of the deficiencies and risks identified, provide a deadline for the subgrantee to submit a corrective action plan, and schedule additional monitoring

activities to address the issues. Whenever possible, monitoring will be scheduled in conjunction with annual Comprehensive Performance Framework (CPF) monitoring visits by the SCSC for state charter schools to avoid duplication of efforts and to reduce administrative burden on schools.

The biannual monitoring visits described above are conducted by a comprehensive review and support team to monitor the subgrantee's progress toward the goals of the grant, identify areas of improvement and growth for the subgrantee, and provide guidance and assistance with identifying resources and partnerships that will support the subgrantee in their long-term success beyond the grant period. An annual report will be provided to each subgrantee and their authorizer, along with community partners and legislators, to highlight the subgrantee's progress towards, and needs for, sustainability after the grant period.

Avoidance of Duplication

This application for CSP funds seeks to reduce the burden on charter schools in accessing funds and reduce the duplication of efforts between school and local charter school authorizers. In the past, CSP grant funds were distributed through the GaDOE's financial portal through a reimbursement request process. GaDOE distributed funds directly to state charter schools and to the local district for locally-authorized charter schools. For this CSP proposal, the SCSF will serve as the fiscal agent, disbursing funds directly to all charter school subgrantees. This will alleviate the need for locally-authorized charter schools to go through two entities to receive grant funds, reducing the time to receive funds and reducing burden on all entities. The SCSF will provide all information about grant awards, requests, and disbursements to the SCSC to conduct monitoring activities, and schools will not be required to submit information or requests more than once. The SCSF will provide subgrantee information to the SCSC directly, and all three parties will meet regularly to ensure proper oversight without duplicating efforts or adding a burden to schools. The SCSF, GaDOE, and the SCSC work closely together to provide cohesion in the guidance and offerings provided to state- and locally-approved charter schools. Financial information required as part of state charter schools' Annual Report process can be obtained directly from GaDOE Finance or from the GaDOE Charter School Grants and Financial Manager. This ensures the state charter schools only need to review the data for accuracy.

Technical Assistance and Support

As previously described in this proposal, technical assistance is a hallmark of the Georgia Strategic Charter School Growth Initiative. The co-applicants have carefully crafted a program that ties technical assistance to grant funds to ensure that schools are prepared to open or expand. Subgrantees will receive programmatic and operational technical assistance from the Georgia Charter Schools Association (GCSA), Bellwether Education Partners, and/or Lead with Excellence (new school leader fellowship program). In addition, subgrantees will receive technical assistance from the SCSF, GaDOE, and the SCSC on subgrant requirements, the petition process, federal grant management, procurement, charter school requirements and laws, and other grant-related topics.

GaDOE will provide technical assistance to charter school authorizers on Georgia's adopted authorizer standards, including online training modules, live sessions, and a manual. GaDOE will also provide technical assistance through the online toolkit for charter school best practices and how to utilize the toolkit. Technical assistance will be open to all schools, but it will be specifically directed to struggling schools. Finally, the SCSF will provide technical assistance to charter schools on updating their school profile on FindaGaCharter.org. The SCSC provides extensive technical assistance and training throughout the year to petitioners, new charter schools, governing boards, and school leaders and personnel.

Quality Authorizing

As previously indicated in this proposal, GaDOE is providing eight training modules to charter school authorizers in Georgia in coordination with NACSA that are available through on online platform. In addition, GaDOE is creating an authorizer manual based on the new authorizer standards developer through a state law. All authorizers will engage in an annual authorizer evaluation process, and technical assistance will be responsible to the findings of these evaluations.

Input from the Community

Georgia is unique from other states because most of the charter schools in the state are single-site charter schools that were created from community need. There is not a well-developed system of charter school networks, which is both a strength and a weakness for charter schools. Charter schools in Georgia are typically deeply embedded in their communities. However, singlesite charter schools sometimes face challenges by not having an administrative infrastructure in place. The Georgia Charter Growth Initiative empowers existing, high-quality charter schools to replicate or expand to extend their reach. All subgrantees will be required to engage with their local communities and involve their community in planning and development. A key component of the initiative is to hold informational sessions about charter schools in communities throughout the state, geared both for potential charter school developers and members of the community. Feedback will be taken from these sessions and will be used to guide the work of the initiative and share with charter schools.

If a charter school closes, GaDOE and the SCSC have established clear plans and procedures for ensuring that students attending a charter school that closes or loses its charter have access to other high-quality schools. The process includes substantial community engagement. The GaDOE Charter School Closure Protocol and SCSC's School Closure Guide (included in Appendix F) requires LEAs (or the SCSC) and charter schools to collaborate in taking the following actions to support students enrolled in closing charter schools: create of a transition team to oversee this process; identify all students enrolled in school; ensure that the LEA and the charter school have the students' complete files; identify several dates and times for public meetings to discuss the closure and available high-quality school options; notification of closure meetings through letter and on the LEA and charter school websites; and discuss high-quality options with parents and students at community meeting Options available and communicated to parents and students include both their zoned school and other state and local charter schools. Districts are required to provide school performance and climate star rating information of all school options to parents and students.

Flexibility for Charter Schools

Georgia charter schools have maximum flexibility as required by law. (O.C.G.A. § 20-2-2065(1)(a)). Charter schools control their budgets, expenditures, staffing, procurement, and curriculum (O.C.G.A. § 20-2-2065(1)(a)). All charter schools are required to be a Georgia nonprofit organization to ensure the charter school board has the autonomy and ability to make all major decisions (O.C.G.A. § 20-2-2065(1)). New board members are required to have at least 15 hours of training that, at a minimum, covers finance, budgeting, best practices on charter school governance, statutory and constitutional requirements relating to public records and open meetings, and other general legal requirements (O.C.G.A. § 20-2-2065(1)). The only areas of law that charter schools are not allowed to waive are those related to student health and safety, testing and accountability, the provisions of charter law, and law falling outside of Title 20.

Quality of Management Plan

The SCSF, GaDOE, and SCSC are coming together to support strategic charter school growth, engage with communities across Georgia, promote high-quality charter school authorizing, and disseminating charter school best practices. The co-applicants are bringing their strengths together to serve the State of Georgia and meet the stated objectives. The SCSF will serve as the fiscal agent and primary program administrator. GaDOE will lead technical assistance for charter school authorizers and leverage its extensive resources to disseminate best practices and serve high-need students. The SCSC will monitor subgrantees, support all activities, provide additional technical assistance opportunities, and serve in a consultative role as an authorizer. Upon grant award, the parties will enter into a memorandum of understanding, outlining the specific responsibilities and duties of each partner. The SCSF will enter into a contract with the SCSC and GaDOE to outline the fees and deliverables under the Georgia Strategic Charter School Growth Initiative as funded by the CSP grant. Funds will be distributed from the SCSF to the SCSC and GaDOE on a schedule and manner agreed upon by the two parties, and disbursements will be tracked through an electronic system.

The SCSF will maintain an online platform for subgrantees to request grant funds. Prior to requesting any funds, subgrantees will be required to submit a budget for approval adhering to all CSP requirements for approved and allocable expenses. All requests will be accompanied by supporting documentation and will be cross-referenced to the subgrantee's approved budget by the Program Coordinator. Subgrantees will be allowed to request funds up to twice a month, and the online system will maintain a record of requests and disbursements that are viewable by the SCSF, SCSC, and subgrantees to ensure proper checks and balances and transparency. Funds for approved requests will be issued directly to subgrantee schools via electronic payment.

All CSP grant funds will be maintained in a separate SCSF bank account designated for federal funds. The SCSF's accountant will maintain separate records for all transactions for federal funds and will produce monthly reports for federal funds, including CSP, for review by the SCSF Treasurer and board. In addition, the accountant will produce additional financial reports for the SCSF that include activity with federal funds, providing transparency. This system of reporting and fund management is currently in use at the SCSF for management of the GEER II fund grant. All board activities and financial reports are posted on the SCSF's online board governance software, Board on Track, which is available through the <u>SCSF's website</u> for public inspection.

Georgia Strategic Charter School Growth Initiativ	e Timeline			
Grant & Program Management				
Task / Benchmark	When	Responsible		
Announce grant award to partners, stakeholders, & charter school community	Upon notice of funding	SCSF, GaDOE, SCSC		
Begin monthly meetings with partners & establish meeting schedule; distribute agenda & minutes week prior to meeting	October 2022; monthly	SCSF, SCSC, GaDOE		
Prepare & submit required reporting to USEd; establish reporting calendar	October 2022- ongoing	SCSF – Program Coordinator		
Enter into MOU & contracts for responsibilities as defined with partners	October 2022	SCSF lead		
Modify & extend contracts with Program Coordinator & Accountant	October 2022	SCSF		
Review, modify, and finalize timeline	October 2022	SCSF, GaDOE, SCSC		
Secure commitments for contract extensions from TA providers for schools	November 2022	SCSF		
Execute contracts for TA for authorizer standards	November 2022	GaDOE		
Execute contract for best practice virtual toolkit	November 2022	GaDOE		
Prepare & submit CSP reimbursement requests	November 2022; monthly	SCSF – Program Coordinator		
Configure software for program for subgrantee management	January 2023			
Attend CSP Project Director's Meeting	February 2023; annually	SCSF – Program Director & Coordinator		
Subgrant & Cohort Management				
Make necessary adjustments to the project plan	October 2022	SCSF		
Review past CSP application & existing Charter Growth Initiative & SCSF grant applications to develop new CSP subgrant application	December 2022	SCSF, GaDOE, SCSC		

Reviewing existing scoring rubrics for past CSP,	December 2022	SCSF, GaDOE, SCSC
Charter Growth Initiative, & SCSF grants to develop		
new rubric		
Develop subgrant policies and procedures consistent	December 2022	SCSF lead (with
with EDGAR and all other applicable federal		partner participation)
regulations		
Obtain subgrant application approval from USEd	January 2023	SCSF
Open replication/expansion subgrant application	February 2023;	SCSF
window (cohort & grants)	annually	
Close replication/expansion subgrant application	April 2023; annually	SCSF
window		
Hold subgrant/cohort applicant interviews	April-May 2023;	SCSF, GaDOE, SCSC
	annually	
Score subgrant applications & make awards	April-May 2023;	SCSF
	annually	
Hold subgrant award TA virtual session	May 2023; annually	SCSF, SCSC
Accept, review, approve CSP subgrant budgets;	May-June 2023;	SCSF (with partner
finalize subgrant agreements	annually	participation)
Open start-up school subgrant application window	June 2023; annually	SCSF
(fellowship & grant)) J	
Accept subgrant reimbursement requests, review for	July 2023; monthly	SCSF – Program
allowability & reasonableness; remit payment		Coordinator
Review subgrantee spending reports	Monthly starting	SCSF – Program
	July 2023	Coordinator
Compile running report of all CSP spending to ensure	Monthly starting	SCSF – Program
timeliness of drawdowns	July 2023	Coordinator
Close start-up school subgrant application window	August 2023;	SCSF
crose start up sensor sucgrant approation window	annually	5051
Hold start-up school subgrant/cohort applicant	August-September	SCSF, GaDOE, SCSC
interviews	2023; annually	
Score start-up school subgrant applications & make	August-September	SCSF
awards	2023; annually	2001
Hold subgrant award TA virtual session	September 2023;	SCSF, SCSC
fiora subgrant avvara fir virtual session	annually	5051,5050
Accept, review, approve CSP subgrant budgets;	September-October	SCSF (with partner
finalize subgrant agreements	2023; annually	participation)
Replication/expansion cohort program (12 months)	September 2023;	SCSF, SCSC
represented on expansion conort program (12 months)	annually	(Bellwether, GCSA)
New school leader fellowship program (12 months)	October 2023;	SCSF, SCSC (Lead
riew school leader tenowship program (12 montals)	annually	with Excellence)
Conduct fiscal desk review	Fall 2023; ongoing	SCSC
Conduct rised desk review Conduct programmatic desk review of data and	Fall 2024; ongoing	SCSC
compliance		
Collect, review, and approve annual performance	Fall 2024; ongoing	SCSC
reports for each subgrantee		
Collect, review, and approve financial reports for	Fall 2024; ongoing	SCSC
each subgrantee		5050
Verify completion of Federal Single Audit (A-133)	Fall 2024; annually	SCSC
for all subgrantees who expend federal funds in	1 an 2027, annually	
excess of the \$750,000 threshold		
excess of the $\phi/50,000$ theshold	l	

Review subgrant application and make modifications	Winter 2023-24;	SCSF, GaDOE, SCSC
as needed	annually	
Conduct implementation site visits	Spring 2024 and	SCSC (with partner
	ongoing	involvement as needed)
Review, approve, and document all CSP budget	Fall 2023 and	SCSF
amendments	ongoing	
Communication & Outreach		
Add CSP information to FindaGaCharter.org	January 2023,	SCSF
	ongoing	
Send email through charter school listservs &	February 2023;	SCSF, GaDOE, SCSC
newsletters about availability of funding/TA	ongoing	(disseminate to other
		charter support groups)
Coordinate with SCSC to ensure timing of subgrant	February 2023,	SCSF, SCSC
notifications coincides with charter application cycle	annually	
Host CSP pre-proposal webinar	February 2023;	SCSF, SCSC
	annually	
Announce CSP subgrant recipients	June 2023; ongoing	SCSF
Review & update community engagement/charter	June 2023; annually	SCSF, SCSC
info meeting schedule & details; revise presentation;		
invite partners; finalize plans for the year		
Widely disseminate charter school best practices to	TBD	GaDOE
struggling schools & all charter schools		
Develop & implement communication strategy for	January 2023;	GaDOE
authorizer training/TA & manual	ongoing	
Technical Assistance	· · · · ·	
Host webinar for prospective subgrantees during	February-April	SCSF
application window	2023; annually	
Conduct TA needs assessment through subgrant	Ongoing	SCSC, SCSF
applications and routine monitoring		
Provide compliance-focused technical assistance to	Ongoing	SCSC, SCSF
subgrant recipients based on findings from		
monitoring activities		
Provide technical assistance to subgrant recipients on	Upon grant award,	SCSF, SCSC
key instructional, operational, organizational,	ongoing	
cultural, financial, and governance topics		
Finalize plans for virtual toolkit for charter school	December 2022,	GaDOE
best practices & begin implementation	ongoing	
Finalize plans for authorizer training/online modules,	January 2023,	GaDOE
TA, authorizing manual, authorizer evaluations	ongoing	

Adequacy of Plan to Achieve Objectives

The State Charter Schools Foundation of Georgia (SCSF) and its partners, the Georgia Department of Education (GaDOE) and State Charter Schools Commission of Georgia (SCSC) have the capabilities and competencies to develop and administer the Georgia Strategic Charter School Growth Initiative. By combining the expertise of three organizations with a strong track record, the team is poised to meet milestones, achieve positive outcomes, and ultimately, provide more high-quality charter school options for Georgia's children and meet other key objectives. Roles and tasks will be clearly divided among team members.

State Charter Schools	Georgia Department of	State Charter Schools
Foundation of Georgia	Education	Commission of Georgia
 Program administrator & fiscal agent Subgrant administrator Administrator of cohort programs Program oversight & accountability Contract management for responsible components Reporting to USEd Website manager for FindaGaCharter.org Communications lead Lead for community information sessions Supplemental support to participant schools Members on Selection Committee 	 Dissemination of best practices TA for charter authorizers Contract management for responsible components Members on Selection Committee 	 Subgrant monitoring Grant & program oversight Communications support Members on Selection Committee

State Charter Schools Foundation of Georgia

The State Charter Schools Foundation of Georgia Inc. (SCSF) has been designated by the coapplicants as the lead applicant, fiscal agent, and grant administrator for this CSP grant opportunity. The SCSF was founded in 2015 after SB156 gave the State Charter Schools Commission (SCSC) the authority to create a charitable foundation to support the work of the commission. The SCSF is nonprofit organization governed by a volunteer board, with standing members from the SCSC. The organization is engaged in charter school growth in Georgia and supports schools authorized by the SCSC with grants, the facilitation of donations, technical assistance and training, and recognition and enrichment programs for school students and faculty. The SCSF is the grant recipient, program administrator, and fiscal agent of the \$4.1 GEER II grant and manager of all programmatic elements of the Georgia Strategic Charter School Growth Initiative, a collaboration between the SCSF, SCSC, and GCSA.

Michele Neely, the president of the SCSF has significant experience managing complex federal grants and contracts and providing government operations consulting services. She also served as a Governing Board Member and then a staff member for the International Charter School of Atlanta, securing and managing the school's CSP subgrant. She is fully prepared to assemble the team to provide positive outcomes for Georgia through this grant opportunity. Annie Chen, Program Coordinator, will provide administrative support and bookkeeping services. Ms. Chen has extensive federal contract management, charter school office management, and banking experience. Doug Erwin, CPA, SCSF accountant, will provide financial reporting and auditing services. The Board Chair, Dr. Adria Welcher, Director of the Education Program and Chair of the Sociology Department at Morehouse College, and James Ted Beck, Executive Director of Audit at the University System of Georgia and SCSF Treasurer, will offer oversight. Ted's previous role as Chief Financial Officer for GaDOE will be valuable for administration of this CSP grant.

Georgia Department of Education

The Georgia Department of Education (GaDOE) is the state educational agency (SEA) for Georgia. The Charter Schools and District Flexibility Department will manage all aspects of GaDOE's involvement in the Charter Growth Initiative and has previous experience managing a CSP State Entity Grant. As the state's oversight agency for all local-district authorizers, GaDOE will manage the performance of all local authorizers, ensuring that high standards are maintained and support and training offered where needed. GaDOE will also serve as liaison between charter schools and traditional schools and systems to facilitate the dissemination of best practices, training, and other supports in order to improve student outcomes across the state.

State Charter Schools Commission of Georgia

The State Charter Schools Commission of Georgia (SCSC) is Georgia's statewide independent charter school authorizer established via constitutional referendum in 2012. While the SCSC's duties are set forth in law and extend beyond simply authorizing schools, the SCSC's principal obligations include:

- 1. Reviewing petitions for state charter schools and assisting in the establishment of state charter schools throughout Georgia;
- Developing and promoting best practices to encourage the development of high-quality charter schools;
- 3. Promoting high standards of accountability for state charter schools; and
- 4. Monitoring and annually reviewing the academic and financial performance, including revenues and expenditures, of state charter schools and holding the schools accountable for their performance pursuant to the charter.

More than 40,000 students across Georgia attend one of the SCSC's 43 state charter schools. State charter schools offer unique and innovative educational models, such as language immersion, single gender, virtual, blended learning, and science and arts-focused, and serve all types of students, including students of color, students with disabilities, English-language learners and gifted students. The SCSC is uniquely qualified to provide subgrant monitoring services for the Georgia Charter Growth Initiative since it performs ongoing monitoring of state charter schools.

Technical Assistance Providers

The Charter Growth Initiative will utilize a group of vetted, experienced technical assistance providers to support charter schools in Georgia. The co-applicants have existing

relationships with all providers and will solicit feedback from program participants to ensure that they provide the highest-quality and most effective services.

 Georgia Charter Schools Association: Incubator Services, Facility & Finance Consulting - The Georgia Charter Schools Association (GCSA) was established in 2001 as a Georgia non-profit, 501(c)(3) corporation and the membership organization for Georgia's charter school operators and petitioners. Approximately 75% of Georgia charter schools are active GCSA members.

The primary goal of the GCSA Charter School Incubator is to increase the number of highquality charter schools in high-need areas throughout the state. The incubator program utilizes a 12- month cohort-based model that incorporates both in-person and virtual convenings that cover all aspects of charter school operations. GCSA Incubator staff work closely with participating schools over the course of the program to ensure critical content is taught, important deadlines are met, and successful charter school applications are submitted. GCSA's incubator has a strong track record of performance, having facilitated approvals for 18 of 19 participating schools.

GCSA's Facility Resource Center (FRC) was established in 2020 to address many of the facility procurement and finance-related challenges identified in recent studies of Georgia's charter school landscape. Because errors made in the early stages of facility development can end up costing charter schools millions of dollars and crippling their long-term financial health, the FRC provides hands on technical assistance during each phase of charter school facilities development. The FRC pairs continuous market evaluations with the customized support and solutions charter schools need to navigate the facility market successfully.

- 2. Lead with Excellence: New School Leader Fellowship Program Lead with Excellence was created by Tori Jackson-Hines, the Founder and Executive Director of Resurgence Hall, one of the highest-performing charter schools in Georgia. The cohort-style program will guide new school leaders through the intricate planning in the year prior to opening a new charter school, including management, planning, academic performance, and community engagement.
- 3. Bellwether Education Partners: Replication and Expansion Cohort Program Bellwether is recognized nationally as a leader in providing services to prepare charter schools for sustainable, impactful growth. Bellwether is engaging the first Georgia cohort Fall 2022, and participants will create a structure and plan for measured growth, based on the schools' individual goals and community input.
- 4. **National Association of Charter School Authorizers (NACSA)**: Technical Assistance for Charter School Authorizers and Evaluation Services – NACSA is the leading voice in quality charter school authorizing and is providing training modules for Georgia's authorizers and has evaluated the SCSC and other authorizers for authorizer effectiveness.

Georgia Strategic Charter School Growth Initiative Team				
State Charter Schools Foundation of Georgia				
Program Director	Michele Neely, MPA, President, State Charter Schools			
	Foundation of Georgia			
Program Support	Annie Chen, MBA, Program Coordinator, State Charter			
	Schools Foundation of Georgia			
Additional Support	Daniel Glenn, Graduate Fellow, State Charter Schools			
	Foundation of Georgia			
Financial Services	Doug Erwin, CPA, Principal C. Douglas Erwin, Jr.			
	CPAs			
Financial Oversight	James Ted Beck, MPA, SCSF Treasurer (Executive			
	Director of Internal Audit, University System of			
	Georgia)			

Program Oversight	Adria Welcher, PhD, Board Chair, State Charter			
	Schools Foundation of Georgia (Chair of Sociology,			
	Morehouse College)			
Georgia Department of Education				
GaDOE Lead	Allen Mueller, Director			
State Charter Schools Commission	n of Georgia			
Program Design &	Kristen Easterbrook, Director of Charter Development			
Implementation				
Subgrantee Monitoring	Cerrone Lockett, JD, General Counsel			
Program Oversight	Lauren Holcomb, MPA, Executive Director, State			
	Charter Schools Commission of Georgia			
	Buzz Brockway, Chair, Commissioner (Vice President			
	of Public Policy, Georgia Center for Opportunity)			
Data and Research Support	Katie Manthey, MPP, Director of Research and			
	Evaluation			

Adequacy of Procedures for Feedback and Improvement

The SCSF will monitor the implementation of strategy for the Charter Growth Initiative through monthly team meetings, ongoing communication with partners, and required reporting from partners and program participants. Upon grant award, the SCSF will convene program partners to finalize the program design, division of responsibilities, task lists, and timelines for various components of the program. Contracts with service providers will include specific deliverables, timelines, and conditions for payment.

The SCSF will create spreadsheets to track all dates, milestones, and requirements throughout the life of the grant. The Program Coordinator will maintain spreadsheets will be responsible for making updates and following up with team members and vendors on due dates and deliverables. The Program Director (SCSF President) will give a monthly update to the SCSC Executive Director and Chair and SCSF Board Chair and Treasurer on activities and status of program implementation.

The Charter Growth Initiative is currently in its first year of operation, and the applicants anticipate that adjustments and improvements will be required with time. As the three entities come together to collaborate and coordinate grantmaking and technical assistance for charter schools in Georgia, the team understands that flexibility is essential for achieving the greatest results. The co-applicants will regularly solicit feedback from the following stakeholders: TA providers, subgrantees, communities, existing charter schools, and partner organizations.

Feedback will be collected after every training or technical assistance program, from the public on the FindaGaCharter.org website and during informational sessions, and from charter school subgrantees throughout the initiative. As the Charter Growth Initiative progresses and progress is monitored, modifications will be made to the strategy to meet the initiative's objectives. Feedback will be considered at partner meetings, and adjustments will be made accordingly. The Program Coordinator will adjust program tracking documents and distribute them to the team as necessary. Any programmatic changes will be posted on the FindaGaCharter.org website and communicated clearly to stakeholders. The team will keep the goals of the program at the forefront at all times and will remain flexible to meet those goals.

Time Commitments of Key Personnel

The co-applicants have personnel in place who are ready to take on new commitments for the Georgia Strategic Charter School Growth Initiative, as proposed in this CSP grant application. The SCSC is contributing staff time as an in-kind contribution to the Georgia Charter Growth Initiative.

Key Personnel Time Commitments						
Name/Position/ Organization	Percent Time Currently Spent on GA Charter Growth Initiative	Percent Time Allocated for GA Charter Growth Initiative with CSP Grant				
Michele Neely, Program Director (SCSF)	50%	50%				
Annie Chen, Program Coordinator (SCSF)	100%	100% (will increase hours from 20 to 40 & make permanent employee)				
Daniel Glenn, Graduate Fellow (SCSF)	25%	25%				
Allen Mueller, GaDOE Lead		25% (TA for authorizer standards, best practices)				
Lauren Holcomb, SCSC Lead	20%	20%				
Kristen Easterbrook, Program Design & Implementation Coordinator (SCSC)	50%	50%				

Application Requirements

Description

Please see the Narrative for additional details.

Application Requirement	Location(s) in Project Narrative
(a)(1)(i) Support the opening, expansion,	Quality of Project Design Pages 15-27
and replication of new charter schools	
(a)(1)(vii)(a) Support LEAs with a	Competitive Preference Priority 3 Pages 10-11
significant number of CSI schools	
(a)(1)(vii)(b) Improve or turnaround	Competitive Preference Priority 3 Pages 10-11
struggling schools	
(a)(1)(ix) Share best practices between	Competitive Preference Priority 3 Pages 10-11
charter schools and other public schools	Project Design and Implementation Pages 34-35
	State Plan: Technical Assistance and Support
	Page 46
(a)(2)(ii) Develop or strengthen cohesive	Background Pages 1-5
statewide system	

(a)(2)(iii) Encourage collaboration	Background Pages 2-5
between charter schools and LEAs on	Competitive Preference Priority 3 Pages 10-11
sharing best practices	Project Design and Implementation Pages 34-35
(8) Evidence to support the requested	Quality of Project Design: Rationale Pages 15-16
funds and project enrollment	Quality of Project Design: Demand and Need
	Pages 19-20
(a)(1)(ii) Inform eligible applicants of	Project Design and Implementation: Outreach for
available funds	Applicants Page 29
(a)(1)(xiii) High schools	Background Pages 4-5
	Project Design and Implementation Pages 25-30
	Quality of Eligible Applicants Receiving
	Subgrants Page 37
(a)(3)(i) Subgrant application review	Quality of Eligible Applicants Receiving
	Subgrants Page 35-43
(a)(3)(ii) Subgrant application	Quality of Eligible Applicants Receiving
	Subgrants Page 35-43
(a)(3)(iii) Priority to engagement with	Quality of Eligible Applicants Receiving
teachers and communities	Subgrants Page 37-42
(a)(7) Diverse models, including rural	Background Pages 4
communities	Project Design and Implementation Pages 25-31
(a)(1)(vi)(A) Subgrantee use of funds	State Plan: Adequate Monitoring of Eligible
	Subgrant Applicants Pages 44-45
	Quality of Management Plan Pages 49-50
(a)(1)(vi)(B) Subgrantee fiscal	State Plan: Adequate Monitoring of Eligible
sustainability	Subgrant Applicants Pages 44-45
(a)(1)(x) Meet the educational needs of	Quality of Eligible Applicants Receiving
students	Subgrants: Selection Criteria Pages 38-40
	State Plan: Adequate Monitoring of Eligible
	Subgrant Applicants Pages 44-45
(a)(9) Subgrantee monitoring, including	State Plan: Adequate Monitoring of Eligible
timeline	Subgrant Applicants Pages 44-45
	Quality of Management Plan Pages 49-52
(a)(1)(iii)(A) Participate in federal	Project Design and Implementation Page 26
programs	
(a)(1)(iii)(B) Receive commensurate	Project Design and Implementation Page 26
share of federal funds	
(a)(1)(iii)(C) Meet the needs of students	Quality of Eligible Applicants Receiving
served under federal programs	Subgrants: Selection Criteria Pages 38-40
	State Plan: Adequate Monitoring of Eligible
	Subgrant Applicants Pages 44-45
(a)(1)(iv) Closure plans and procedures	State Plan: Input from the Community Pages 47-
	48
(a)(1)(viii)(A) Promote inclusion in	Competitive Preference Priority 5: Serving At-
recruitment and enrollment	Risk Students Pages 12-13
(a)(1)(viii)(B) Promote student retention	Quality of Eligible Applicants Receiving
	Subgrants Page 37

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(a)(1)(xi) School quality initiatives	Absolute Priority: Best Practices for Charter
	School Authorizers Pages 5-8
	Project Design and Implementation: Basis for
	Program Design Pages 33-34
(a)(4) Partner organization roles and	Quality of Management Plan Pages 49-60
responsibilities	
(a)(5) Transportation for students	Georgia believes that a proper consideration of
	transportation needs is vital to ensuring more students have
	access to a high-quality charter school. First, charter school
	applicants must describe how their governing board has
	considered the transportation needs of their students. This is
	a requirement in the start-up and renewal charter
	applications. Applicants must carefully consider and
	explain the transportation services provided to their
	students, including whether the services currently meet the
	needs of their student population.
	Second, if the charter school offers transportation
	services to its students, GaDOE incorporates this provision
	of services into the charter school's contract and assurances
	form. Georgia wants to ensure that charter schools are
	following the proper state and federal guidelines, should the
	school offer these services to their students.
	Lastly, the co-applicants will inform subgrantees
	about the availability of the state facilities grant. The state
	facilities grant can be used to purchase student
	transportation vehicles (O.C.G.A. § 20-2-2068.2(c)). All
	charter schools receive a facility grant disbursement
	annually.
Ath an Dagwin and and	-

Other Requirements

(a)(1)(v) The SCSF, fiscal agent and administrator designated for this CSP State Entity grant, is a nonprofit organization. One co-applicant is GaDOE, the SEA. As a part of subgrantee technical assistance, the SCSF, GaDOE, and SCSC will ensure that charter schools are aware of the federal funds for which they are eligible and will provide guidance for accessing these funds. GaDOE will ensure resources from the Federal Programs team are made available.
 (a)(1)(xii) A & B Georgia's proposal features a partnership between the SCSF, charter support entity, GaDOE, the SEA, and the SCSC, the state charter authorizing board. The three will work in tandem to support Georgia's new authorizer standards. GaDOE is providing training and technical assistance to charter authorizers on the standards. In addition, GaDOE

Charter Growth Initiative p. 63

will assist authorizers with evaluations. The entities will work together to support the system developed by the state for authorizers.

3) (a)(3)(ii)(G) A description of the needs analysis required of all applicants to the Charter Growth Initiative, including steps taken to ensure demographic diversity and avoid racial segregation/isolation can be found in pages 39 through 42. None of the applications currently involved in the Georgia Charter Growth Initiative involve counties or districts under court order involving desegregation. Any further counties or districts to be involved would be screened using the resources we have already compiled on this subject as well as direct communication with local government entities.

4) (a)(2)(ii) Please see pages 5-12 for details on Georgia's ability to meet priorities 1 through 5.
5) (a)(5) Georgia public charter schools are subject to both the Open Records Act (O.C.G.A. 50-18-70, et. seq.) and the Open Public Meetings Act (O.C.G.A. 50-14-1, et. seq.).
Demonstrated compliance is required for consideration for subgrants.

Assurances

The co-applicants affirm the agreement with the assurances, as indicated by the signed form included with the application. The GaDOE and SCSC have authorized the SCSF to sign on behalf of all applicants.

Request for Information about Waiver

Georgia does not anticipate requesting any waivers for this program.

References

- Bluestone, P., Sjoquist, D., & Warner, N. (2017). The effect of start-up charter schools on nearby property values. Center for State and Local Finance: Andrew Young School of Policy Studies. <u>https://scsc.georgia.gov/document/publication/effect-start-charter -</u> schools-nearby-property-values/download
- Bluestone, P., & Warner, N. (2018). The effect of start-up charter schools on academic milestones. Center for State and Local Finance: Andrew Young School of Policy Studies. <u>https://scsc.georgia.gov/document/publication/rep-3charter-schools-and-academic-milestones20180418pdf/download</u>
- Bluestone, P., & Warner, N. (2021). The effect of start-up charter schools on earnings and academic milestones. Center for State and Local Finance: Andrew Young School of Policy Studies. <u>https://scsc.georgia.gov/document/publication/rep-3charter-schools -andacademic-milestones20180418pdf/download</u>
- Georgia Charter Schools Association. (n.d.) *School locator*. Retrieved August 25, 2021 from https://gacharters.org/school-locator/
- Georgia Charter Schools Association. (2020, September 10). *Statewide poll shows strong support for public charter schools* [Press release]. <u>https://gacharters.org/press-</u> <u>releases/statewide-poll-shows-strong-support-for-public-charter-schools/</u>
- Georgia Department of Community Affairs. (n.d.) *Federal opportunity zones*. Retrieved August 25, 2021 from <u>https://georgiadca.maps.arcgis.com/apps/webappviewer/index.html?id</u> =3e0a3b024d844437bd88d8069d7182a3

National Association of Charter School Authorizers. (2014, January.) Replicating quality: Policy

recommendations to support the replication and growth of high-performing charter schools and networks. <u>https://www.schoolrestarts.org/wpcontent/uploads/2016/05/</u> <u>NACSA_Replicating_Quality.pdf</u>

Other Attachment File(s)

* Mandatory Other Attachment File	name:	1234-Ap	ppendix	: A -	Georg	ſia	Charter	School	Program A
Add Mandatory Other Attachment	Delete	Mandato	ry Other	Attac	hment	Vie	ew Mandat	ory Other	Attachment

To add more "Other Attachment" attachments, please use the attachment buttons below.

Add Optional Other Attachment	Delete Optional Other Attachment	View Optional Other Attachment
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Appendix A - Expanding Opportunity Through Quality Charter Schools Program (CSP) Grants to State Entities Charter Schools Program Assurances

Pursuant to section 4303(f)(2) of the Elementary and Secondary Education Act of 1965, as amended by the Every Student Succeeds Act (ESEA), and sections 200.302(a) and 200.331(d) of the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), recipients of CSP Grants to State Entities must provide the assurances described below.

As the duly authorized representative of the grantee, I certify to the following:

(1) Each charter school receiving funds through the State entity's program will have a high degree of autonomy over budget and operations, including autonomy over personnel decisions (4303(f));

(2) The State entity will support charter schools in meeting the educational needs of their students, including children with disabilities and English learners (4303(f));

(3) The State entity will ensure that the authorized public chartering agency of any charter school that receives funds under the State entity's program adequately monitors each charter school under the authority of such agency in recruiting, enrolling, retaining, and meeting the needs of all students, including children with disabilities and English learners (4303(f));

(4) The State entity will provide adequate technical assistance to eligible applicants to meet the objectives described in application requirement (a)(1)(8) (4303(f));

(5) The State entity will promote quality authorizing, consistent with State law, such as through providing technical assistance to support each authorized public chartering agency in the State to improve such agency's ability to monitor the charter schools authorized by the agency, including by-

(i) Assessing annual performance data of the schools, including, as appropriate, graduation rates, student academic growth, and rates of student attrition;

(ii) Reviewing the schools' independent, annual audits of financial statements prepared in accordance with generally accepted accounting principles and ensuring that any such audits are publicly reported; and

(iii) Holding charter schools accountable to the academic, financial, and operational quality controls agreed to between the charter school and the authorized public chartering agency involved, such as renewal, non-renewal, or revocation of the school's charter (4303(f));

(6) The State entity will work to ensure that charter schools are included with the traditional public schools in decision-making about the public school system in the State (4303(f));

(7) The State entity will ensure that each charter school receiving funds under the State entity's program makes publicly available, consistent with the dissemination requirements of the annual State report card under section 1111(h) of the ESEA, including on the website of the school, information to help parents make informed decisions about the education options available to their children, including--

- (i) Information on the educational program;
- (ii) Student support services;

- (iii) Parent contract requirements (as applicable), including any financial obligations or fees;
- (iv) Enrollment criteria (as applicable); and

(v) Annual performance and enrollment data for each of the subgroups of students, as defined in section 1111(c)(2) of the ESEA, except that such disaggregation of performance and enrollment data shall not be required in a case in which the number of students in a group is insufficient to yield statistically reliable information or the results would reveal personally identifiable information about an individual student (4303(f)).

(8) The State Entity will ensure that each charter school receiving CSP funding has not and will not enter into a contract with a for-profit management organization, including a nonprofit management organization operated by or on behalf of a for-profit entity, under which the management organization, or its related entities, exercises full or substantial administrative control over the charter school and, thereby, the CSP project (2022 NFP).

(9) Each charter school receiving CSP funding will provide an assurance that any management contract between the charter school and a for-profit management organization, including a nonprofit CMO operated by or on behalf of a for-profit entity, guarantees or will guarantee that--

(i) The charter school maintains control over all CSP funds, makes all programmatic decisions, and directly administers or supervises the administration of the subgrant;

(ii) The management organization does not exercise full or substantial administrative control over the charter school (and, thereby, the CSP project), except that this does not limit the ability of a charter school to enter into a contract with a management organization for the provision of services that do not constitute full or substantial control of the charter school project funded under the CSP (e.g., food services or payroll services) and that otherwise comply with statutory and regulatory requirements;

(iii) The charter school's governing board has access to financial and other data pertaining to the charter school, the management organization, and any related entities; and

(iv) The charter school is in compliance with applicable Federal and State laws and regulations governing conflicts of interest, and there are no actual or perceived conflicts of interest between the charter school and the management organization (2022 NFP).

(10) Each charter school receiving CSP funding will post on its website, on an annual basis, a copy of any management contract between the charter school and a for-profit management organization, including a nonprofit management organization operated by or on behalf of a for-profit entity, and report information on such contract to the State entity, including--

(i) A copy of the existing contract with the for-profit organization or a detailed description of the terms of the contract, including the name and contact information of the management organization, the cost (i.e., fixed costs and estimates of any ongoing cost), including the amount of CSP funds proposed to be used toward such cost, and the percentage such cost represents of the charter school's total funding, the duration, roles and responsibilities of the management organization, and the steps the charter school is taking to ensure that it makes all programmatic decisions, maintains control over all CSP funds, and directly administers or supervises the administration of the grant or subgrant in accordance with 34 CFR 76.701;

(ii) A description of any business or financial relationship between the charter school developer or CMO and the management organization, including payments, contract terms, and any property owned, operated, or controlled by the management organization or related individuals or entities to be used by the charter school; (iii) The names and contact information for each member of the governing boards of the charter school and a list of management organization's officers, chief administrator, and other administrators, and any staff involved in approving or executing the management contract; and a description of any actual or perceived conflicts of interest, including financial interests, and how the applicant resolved or will resolve any actual or perceived conflicts of interest to ensure compliance with 2 CFR 200.318(c); and

(iv) A description of how the charter school ensured that such contract is severable and that a change in management companies will not cause the proposed charter school to close (2022 NFP).

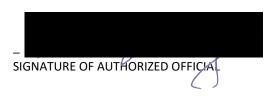
(11) Each charter school receiving CSP funding will disclose, as part of the enrollment process, any policies and requirements (e.g., purchasing and wearing specific uniforms and other fees, or requirements for family participation), and any services that are or are not provided, that could impact a family's ability to enroll or remain enrolled in the school (e.g., transportation services or participation in the National School Lunch Program) (2022 NFP).

(12) Each charter school receiving CSP funding will hold or participate in a public hearing in the local community in which the proposed charter school would be located to obtain information and feedback regarding the potential benefit of the charter school, which shall at least include information about how the proposed charter school will increase the availability of high-quality public school options for underserved students, promote racial and socio-economic diversity in such community or have an educational mission to serve primarily underserved students, and not increase racial or socio-economic segregation or isolation in the school districts from which students would be drawn to attend the charter school (consistent with applicable laws). Applicants must ensure that the hearing (and notice thereof) is accessible to individuals with disabilities and limited English proficient individuals as required by law, actively solicit participation in the hearing (*i.e.*, provide widespread and timely notice of the hearing), make good faith efforts to accommodate as many people as possible (*e.g.*, hold the hearing at a convenient time for families or provide virtual participation options), and submit a summary of the comments received as part of the application. The hearing may be conducted as part of the charter authorizing process, provided that it meets the requirements above. (2022 NFP).

(13) No eligible applicant receiving funds under the State entity's program will use implementation funds for a charter school until after the charter school has received a charter from an authorized public chartering agency and has a contract, lease, mortgage, or other documentation indicating that it has a facility in which to operate. Consistent with sections 4303(b)(1), 4303(h)(1)(B), and 4310(6) of the ESEA, an eligible applicant may use CSP planning funds for post-award planning and design of the educational program of a proposed new or replicated high-quality charter school that has not yet opened, which may include hiring and compensating teachers, school leaders, and specialized instructional support personnel; providing training and professional development to staff; and other critical planning activities that need to occur prior to the charter school opening when such costs cannot be met from other sources. (2022 NFP).

Michele Neely

NAME OF AUTHORIZED OFFICIAL



<u>State Charter Schools Foundation of Georgia</u>, Inc. APPLICANT ORGANIZATION President TITLE

<u>July 30, 2022</u> DATE

August 4, 2022 DATE SUBMITTED INTERNAL REVENUE SERVICE P. O. BOX 2508 CINCINNATI, OH 45201

- 6 a

Date: FEB 19 2016

STATE CHARTER SCHOOLS FOUNDATION OF GEORGIA INC 205 JESSE HILL JR DR SE STE 1470B E ATLANTA, GA 30334

17053271313005		
Contact Person:		
GERRY R MCLAUGHLIN	ID#	31115
Contact Telephone Number:		
(877) 829-5500		
Accounting Period Ending:		
June 30		
Public Charity Status:		
170(b)(1)(A)(vi)		
Form 990/990-EZ/990-N Require	d:	
Yes		
Effective Date of Exemption:		
July 8, 2015		
Contribution Deductibility:		
Yes		
Addendum Applies:		
No		

Employer Identification Number:

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

DLM.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 590/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements. STATE CHARTER SCHOOLS FOUNDATION OF

-2-

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Since

Jeffrey I. Cooper Director, Exempt Organizations Rulings and Agreements



PROFESSIONAL LICENSING

GEORGIA SECRETARY OF STATE BRAD RAFFENSPERGER

CORPORATIONS . ELECTIONS . LICENSING . CHARITIES

Licensee Details

Licensee Information

Name: St	Iame: State Charter Schools Foundation of Georgia, Inc. Owner: Michele Neely, President						
		Error retriev	ing address inform	ation			
Primary	Source License Informati	on					
Lic #:	CH015633	Profession:	Charities	Туре:	Charity		
Secondar	y:	Method:	Application	Status:	Active		
Issued:	3/12/2021	Expires:	3/12/2023	Last Re	enewal Date:		
Associate	ed Licenses						
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Public Bo	oard Orders						
	Please see Documents section below for any Public Board Orders						
Other Do	ocuments						
		No C	Other Documents				

Data current as of: March 24, 2022 18:44:19

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GEORGIA STRATEGIC CHARTER SCHOOL GROWTH INITIATIVE

A PROPOSAL FOR FY2022 CSP GRANTS TO STATE ENTITIES

Presented by the State Charter Schools Foundation of Georgia

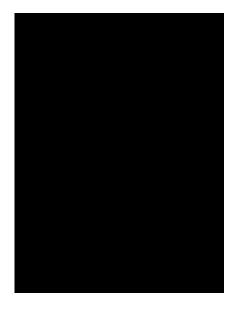
PART 7: OTHER ATTACHMENTS – APPENDIX E Proprietary Information

The applicants are not submitting any proprietary information.









GEORGIA STRATEGIC CHARTER SCHOOL GROWTH INITIATIVE

A PROPOSAL FOR FY2022 CSP GRANTS TO STATE ENTITIES

Presented by the State Charter Schools Foundation of Georgia

PART 7: OTHER ATTACHMENTS – APPENDIX B

Resumes

- Michele Neely
- Allen Mueller
- Annie Chen
- Lauren Holcomb
- Kristen Easterbrook
- Cerrone Lockett
- Katie Manthey
- Buzz Brockway
- Adria Welcher
- Doug Erwin
- Ted Beck









Michele J. Neely

Dedicated professional with leadership experience in the nonprofit, public, and private sectors, promoting innovative, equitable public education through charter schools.

Experience

President State Charter Schools Foundation of Georgia (SCSF)

November 2019-Present Atlanta, Georgia

Leader of a nonprofit foundation dedicated to helping state charter schools launch, build capacity, and grow (charitable arm of the State Charter Schools Commission, a state agency).

- Secured \$4.1 million GEER II grant from the Office of the Governor, Georgia to establish the Georgia Strategic Charter School Growth Initiative
- Administer GEER II grant and oversee all aspects of the Charter Growth Initiative, including subgrants, partner and vendor relationships, and program implementation
- Manage all aspects of SCSF operations, governance, and programming
- Develop and manage all fundraising initiatives and grant proposals
- Manage grant funds and awards to state charter schools
- Provide direct technical assistance and training to state charter schools on school operations, including fundraising, reporting, grant management, marketing, procurement, and governance
- Secure group pricing and technical assistance from vendors for state charter schools
- Leverage in-donations and pro bono services for state charter schools
- Provide communications and marketing support for state charter schools and the charter school movement in Georgia
- Develop and implement signature programs including Shining Star Teachers, Donuts for Teachers, The Art of Connection Exhibition of Student Art, Reading Works for K-3 Literacy, and Schools of Wellness
- Member Communications Committee, COVID-19 Task Force, Georgia Charter Schools Association
- Member, Community Advisory Council for Georgia, BES (Building Excellent Schools)
- 2020-21 Georgia Fellow Education Policy Fellowship Program (Georgia Partnership for Excellence in Education)

Development and Communications Manager / Governing Board International Charter School of Atlanta (ICSAtlanta)

March 2016-October 2019 Roswell, Georgia

Governing Board Member and Chair of the Fundraising Committee, becoming a staff member dedicated to supporting the unique mission of ICSAtlanta, a high-performing, dual language immersion state charter school.

- Raised over \$1,100,000 in grants and donations, including management of annual Fall Giving Campaign, Run the World with ICSAtlanta 5K & Fun Run, and annual silent auction; prepared all grant proposals and related reports; maintained fundraising software and online payment system for all donations and student payments
- Managed all federal and GaDOE grants, including preparation and submission of applications, budgets, reports, and maintenance of all records, including preparation for audits and reviews
- Served as media relations contact and secured positive media promotion
- Maintained ICSAtlanta website and Facebook page
- Developed all marketing materials, including recruitment materials
- Supported the Governing Board and administration by drafting and researching policies and procedures; leading implementation of BoardDocs software to maintain and organize policies and procedures online
- Led advocacy efforts, including parent participation at the Georgia Capitol to support HB787 to increase state charter school funding
- Served as primary contact for the Parent-Teacher Organization (PTO), successfully improving relationship and developing cooperative social media procedures
- Managed RFQ and large procurement process

- Served as a Governing Board Member during the expansion to middle school, including purchasing a building
- Member Communications Committee, Georgia Charter Schools Association
- Presenter/panelist at State Charter Schools Commission of Georgia Governance Trainings

Director of Advancement / Grants and Events Manager Habitat for Humanity – North Central Georgia

Fundraising professional responsible for management of all private and government grants, events, and media relations, promoted to the head of fundraising. Left to join the staff of ICSAtlanta and dedicate myself to public education.

Vice President / Senior Associate CVR Associates

Management consultant providing solutions for public housing authorities, ensuring regulatory and program compliance; maintaining public-private partnerships; identifying community needs; communicating with program participants, the public, and commissioners; developing effective policies and procedures; and driving efficiency, compliance, and customer service with technology solutions.

Clients: NY State Division of Housing and Community Renewal, Atlanta Housing Authority, New York City Housing Authority, Chicago Housing Authority, Gary Housing Authority, Buffalo Municipal Housing Authority, Public Housing and Community Development Department for the City of Miami, Spartanburg Housing Authority

- Provided managerial oversight for Housing Choice Voucher programs operated by CVR Associates across the country, ensuring compliance with complex federal regulations (over 200 employees)
- Conducted organizational assessments, provided recommendations, and delivered related services, including extensive training programs for agencies, acting as Project Director for State of New York contract
- Prepared proposals, quotes, and responses to RFPs/RFQs (including multi-million dollar federal contracts); delivered presentations; and provided client management support
- Developed communications for the public, program participants, and clients through website content, newsletters, press releases, presentations, forms, and letters; developed library of new program forms and letters used in multiple housing authorities
- Assisted with CVR marketing materials, content for brochures, and rebranding
- Provided sales support, project management and training, and framework for CVR technology solutions
- Oversaw Housing Quality Standards inspection operations (approximately 35,000 inspections annually)
- Managed successful Atlanta Housing Authority Housing Choice Voucher waiting list opening, collecting over 113,000 pre-applications online (January 2015)

Assistant Director, Rental Assistance Division Tennessee Housing Development Agency

March 2005-September 2009 Nashville, Tennessee

Social services/government management professional managing large, statewide federally-funded rental assistance program within a state agency and providing support for agency-wide goals and initiatives, including community development activities.

- Assisted in the management of a \$30 million, statewide Housing Choice Voucher program (Section 8) with 9 field offices and the central office, including 61 staff members
- Directly managed the Family Self-Sufficiency and Homeownership Voucher programs (200+ participants)
- Managed monthly HCV Program payment processing to property owners (over \$2 million/month)
- Created and/or maintained required policies and over 200 forms
- Delivered technical assistance training within the department and agency, throughout the state
- Served as a member of THDA BUILD Loan Committee, reviewing, scoring, and selecting applications for low-interest loan/grant for nonprofit organizations, promoting community development activities

April-December 2017 Roswell, Georgia

August 2010-April 2017 Alpharetta, Georgia

Selected for Tennessee Government Management Institute (Fall 2007)

Executive Director Macon Area Habitat for Humanity

•

Community leader responsible for ensuring the operational integrity of a local nonprofit housing organization, following the mission and vision set by the board of directors, to promote affordable homeownership and community engagement.

- Managed all aspects of the local Habitat for Humanity affiliate including fundraising, public relations, community development, construction, volunteer management, and mortgage servicing
- Increased house production, number of employees, number of donors and volunteers; developed joint fundraising approach with Habitat for Humanity International
- Worked in partnership with Macon Housing Authority, community development corporations, the Macon Housing Authority, the City of Macon, and Mercer University to build Habitat homes in historic district
- Contributed frequently to Habitat for Humanity International publications and training events

Director of Development Mercer University

Professional fundraiser for Walter F. George School of Law and Engineering School.

Community Affairs Coordinator King & Spalding, LLP

Coordinator for employee volunteer program and firm's philanthropy efforts, selecting Atlanta nonprofits for support.

Peace Corps Volunteer – Far East Russia

English and Spanish teacher for children and adult. Resource development.

Education

Current Student – Doctor of Education in Leadership program Expected graduation 2025

Master of Public Administration, Nonprofit Administration Summa Cum Laude, Graduate Research Assistant

Bachelor of Arts, English and Spanish

Summa Cum Laude, Louie D. Newton Award Winner, Presidential Scholar, study abroad in Spain Valdosta State University Valdosta, Georgia

Georgia State University Atlanta, Georgia

Mercer University Macon, Georgia

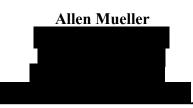
June 2002-March 2005 Macon, Georgia

Macon, Georgia

October 2000-June 2002

May 1999-October 2000 Atlanta, Georgia

1997-1998



SUMMARY

Seasoned Executive Director with twenty years of experience in public education; fifteen years in the charter school sector. Expertise in charter school start-up and performance monitoring. Extensive knowledge of Georgia and national charter law, local and national education landscape. A highly effective manager, collaborator, trainer, speaker, mentor/motivator, and evaluator with outstanding team leadership qualities.

PROFESSIONAL EXPERIENCE

GEORGIA DEPARTMENT OF EDUCATION September 2017 - Present

Director, District Flexibility and Charter Schools Division

- Directs the administration of the Georgia's District Flexibility and Charter School Program
- Provides technical assistance to local education agencies on planning, coordination, and implementation of programs
- Manages state and federal grants and strategic planning

VANTAGE LEARNING February 2016 – September 2017

Strategic Account Executive

- Worked with schools, districts, and state agencies to develop solutions for managing, organizing, and presenting academic, operations, and financial data
- Collaborated with engineers to develop charter-school-specific software using Artificial Intelligence and other patented Vantage technology

GEORGIA CHARTER SCHOOLS ASSOCIATION November 2014 – February 2016

Executive Director, New Schools for Georgia

- Development, oversight and management of Georgia's first charter school incubator program
- Developed and provided training and support to new school leaders and boards

ATLANTA PUBLIC SCHOOLS December 2007 – November 2014

Executive Director of Innovation April 2012 – November 2014

- Oversight of Charter School Program
- Creation of District Career Academies

- Creation of District Partnership Schools
- Responsible for dissemination of charter school best practices to schools
- Management of selected grant-funded innovative programs

Director of Charter School Program January 2009 – April 2012

- Creation and implementation of district five-year strategic plan for charter schools.
- Development and implementation of numerous authorization process improvements, including: posted evaluation rubrics, recruitment of external expert evaluators, applicant interviews, applicant information sessions, strategic use of district facilities to drive authorization process
- Development and implementation of school monitoring and support process including increasing charter school access to district resources, including: Professional Development, competitive sports, surplus facilities, IT support, surplus furniture and other resources
- Development of strong and close working relationships with board members, school leaders and key stakeholders in both traditional and charter schools within the district and nationally
- Management of \$700,000 annual budget, APS Charter Office staff

Charter School Coordinator December 2007 – January 2009

• Duties as assigned by Chief of Staff

MOSAICA EDUCATION INC. September 2003 - December 2007

Director of Business Development

- Managed charter school formation process from board formation and training to authorizer approval for charter schools in Georgia, Florida, Colorado, Louisiana, Ohio, California and Illinois. Provided support to charter schools in network
- Researched, wrote and submitted winning charter school proposals to several state and local Boards of Education
- winning proposals for Federal Start-up and Implementation Grants for charter schools

EDUCATION

UNIVERSITY OF WISCONSIN, MADISON

Prelims and Orals passed; Ph.D. (ABD) British Literature (Romanticism) German Literature (Minor)

SAN FRANCISCO STATE UNIVERSITY

Bachelor of Arts (*cum laude*), May 1991 Masters Degree, June 1992 English and American Literary Studies

Yun Fang (Annie) Chen

EXECUTIVE SUMMARY

- Professional with 5+ years of management and 10+ years of accounting experiences in both profit and non-profit governmental accounting
- > Possess strong analytical, great problem-solving, and detail-oriented skills
- > Ability to multi tasks and work independently in a fast-paced environment and meet tight deadlines

EXPERIENCE

International Charter School of Atlanta

(ICSAtlanta is a State Public Charter School that offers K-8th grades with more than 800 students and over 100 staff) **Business Manager** (July 2018 – Present)

Significant Accomplishments:

- > Applied PPP loan and received 100% forgiveness in the amount exceed of \$888K
- > Applied Employer Retention Tax Credits and received over \$600K tax credits
- > Discovered school's overpayments and recollected more than \$76K from worker's compensation carrier
- > Improved overall annual financial audit results from "does not meet" to "meet" in a year

Role:

- Assist in preparing, developing, and monitoring budgets
- Establish, maintain, and update finance policies for the school
- Oversee the daily financial operations includes process all expenditures, reconcile credit card expenses, records all deposits, and balancing and reconciliations all financial activities
- Manage and maintain financial records and chart of accounts
- Assist in year-end audits to ensure all accounting data are accurate
- Prepare and review W2, 1095/1094, 1099's and other year-end financial reporting
- Create and prepare various financial reports
- Facilitate post award financial/accounting grant processes including the grant MOE/excess cost reporting
- Prepare and process monthly payroll for over 100 employees
- Reconcile all benefit deductions with benefits bills and payroll reports
- Ensure accuracy of staff's time and attendance records
- Ensure compliance with IRS and other governmental laws and regulations
- Prepare human resource management by processing all new hire paperwork including e-verify, assist with benefits enrollment and annual benefits open enrollment
- Ensure compliance with school's health and safety policies
- Update and maintain ADP Workforce Now

CVR Associates, Inc.

Project Accountant (August 2016 – June 2008)

Accomplishments:

Discovered and recollected firm's overpayment of various overhead expenses, resulting in total credit exceeding \$20K

Role:

- Coded invoices to the appropriate general ledger accounts by using QuickBooks
- Handled accounts payable and process high-volume invoices
- Assisted in audits by providing supporting documentation
- Prepared and reviewed monthly reports in a timely manner
- Researched and resolved any discrepancies in invoices
- Reconciled monthly banking statements and credit card transactions
- Maintained and developed key relationships with external vendors

AEME Enterprises, LLC

Owner and Manager, Apr 2012 - Present

Role:

• Establish and maintain a strong relationship with property tenants, vendors, and contractors

- Oversee collection of rent
- Monitor property cash flows on monthly basis
- Manage financial operations- Payments for taxes, maintenance, insurance, and others
- Review monthly financial reports for accuracy

RockBridge Commercial Bank - Atlanta, GA

Commercial Relationship Manager, Jul 2007 ~ Dec 2009

Accomplishments:

> Managed quality commercial loan portfolio over \$100M with a single account above \$15M <u>Role</u>:

- Built strong relationship with clients through consistent communication to expand their business while providing personable customer service
- Prepared and created various reports for loan committee and for the Board
- Oversaw participation notes funding with other financial institutions
- Monitored new and existing loan files and performed credit reviews to ensure compliance with regulatory requirements

American United Bank - Lawrenceville, GA

Vice President, Loan Operation, Oct 2005 ~ Jul 2007

Accomplishments:

Supported loan officers in approval decision making more than \$10M in value <u>Role</u>:

- Managed and controlled loan operations, loan compliance and loan review
- Prepared Loan Committee Minutes and the Board Minutes
- Implemented procedures and policies to reduce loan exceptions
- Conducted credit analysis, cash flow projections, financial modeling, and financial statement analysis to

Global Commerce Bank - Atlanta, GA

Loan Officer/Administrator, Jan 2004 ~ Oct 2005

Role:

- Performed daily operations including loan booking, billing, delinquency report, credit report analysis, processing draw requests and loan payments
- Responsible for processing and underwriting commercial, real estate, automobile, and consumer loans
- Prepared reports to complete the Loan Committee package
- Conducted site visits and prepared all related reports

First Data Corporation - Merchant Services, Atlanta GA

Account Executive, Feb 2000~Apr 2001

Accomplishments:

Generated \$3M revenue in one month; selected as Employee of the Month and the Top 5 AE of 2000 <u>Role</u>:

- Proposed expansion plan and provided implementation recommendations for Asian markets
- Improved customer service in Asian markets by identifying the need for, then developing and implementing
 multilingual user's guides and instructions
 consistently one of the top revenue producers
- Responsible for maintaining existing customer relationships

EDUCATION

2019 Charter Schools Financial Management Certification - University of Georgia

2003 Master of Business Administration - Mercer University, Atlanta, GA.

1999 Bachelor of Business Administration in International Business and Finance - Mercer University, Macon, GA.

ADDITIONAL SKILLS

- Fluent in English, Taiwanese and Chinese (Mandarin)
- Quickbooks Online, Blackbaud/eTapstery, ADP Workforce Now, bill.com
- MS Office (Excel power user, Access, Word, Outlook, PowerPoint)

LAUREN WRIGHT HOLCOMB

EXPERIENCE

STATE CHARTER SCHOOLS COMMISSION OF GEORGIA

Executive Director

Oversee operations of Georgia's independent charter authorizing board, including strategic planning, policy, communications and other activities. Work closely with board members, policymakers and stakeholders to align agency initiatives with the state's education goals and ensure that state charter schools are fulfilling the SCSC mission of providing students with high quality educational opportunities.

Chief Communications Officer

Directed all internal and external agency communications, including media interaction and agency outreach. Served as the agency's primary spokesperson and directed the planning, control and implementation of communications. Managed the agency's research agenda to disseminate charter school best practices and build capacity within the charter sector.

Director of Organizational & Resource Development

Developed and implemented a suite of support services to meet the needs of existing and • prospective state charter school governing boards, leaders and staff members. Established partnerships with external entities to drive charter school improvement and expansion. Launched the SCSC agency foundation, the State Charter Schools Foundation of Georgia.

GOVERNOR'S OFFICE OF STUDENT ACHIEVEMENT

Innovation Fund Director

• Directed \$20 million grant program focused on establishing innovative public-private partnerships to benefit students in Georgia's K-12 education system.

OFFICE OF GOVERNOR SONNY PERDUE

Education Policy Advisor

Served as advisor to Governor Perdue on education policy issues spanning pre-K to higher • education. Responsibilities included advancing Governor's agenda at the federal and state levels and coordinating with state education agencies to implement the Governor's policy initiatives.

External Affairs Liaison

Served as the primary event planner and advance staffer for all Governor's Office events. Responsibilities included planning and executing Governor's Office events and facilitating the Governor's participation in external events; briefing Governor on his role and pertinent background issues; communicating the Governor's message to the media, public and stakeholders.

EDUCATION

GEORGIA STATE UNIVERSITY, ANDREW Master of Public Administration: Policy Ar		2009
THE UNIVERSITY OF GEORGIA, GRADY Bachelor of Arts in Journalism	College	2006
THE UNIVERSITY OF GEORGIA, SCHOOL Bachelor of Arts in Political Science	PR/Award # S282A220006	2006
	Page e101	

2019 – present

2018-2019

2013 - 2018

2009 - 2011

2011 - 2013

2007 - 2009

EDUCATION

Mercer University | Macon, GA | December 2013 Bachelor of Arts, Political Science, *magna cum laude*

EXPERIENCE

State Charter Schools Commission of Georgia | August 2017- Current

Director of Charter Development | February 2022- Current Charter Development Manager | September 2019- February 2022

- Manage the agency's training and support programs including both contracted technical assistance programs and SCSC-hosted training events
- Oversee the pre-opening process for all approved schools including conducting site visits, monitoring compliance with the SCSC's Pre-Opening Checklist, and serving as a subject matter expert on pre-opening related matters for the agency

New Charter Program Manager | January 2019- September 2019

- Manage the agency's petition approval process including reviewing petition applications and leading capacity interviews for potential charter school boards
- Develop and deliver petition-specific trainings for potential school founding teams

Business Manager | August 2017- January 2019

- Serve as a financial expert for the commission, including the analysis and maintenance of the commission's budgeting and expenditure controls
- Manage the agency's intern program, including recruiting, hiring, onboarding, and managing intern projects

Georgia Department of Early Care and Learning | May 2015- August 2017

System Reform Coordinator

- Coordinate and attend meetings with internal and external stakeholder groups to promote quality early learning and other agency initiatives
- Support the planning, preparation, and execution of special events and conferences
- Provide logistical and administrative support for special projects for the agency's Commissioner and Deputy Commissioners
- Create and coordinate the agency's formal intern program

Office of Governor Nathan Deal | June 2014- May 2015

Education Policy Fellow

- Attend committee meetings, prepare legislative and policy briefings, track legislation, and general office duties

Office of State Rep. Bubber Epps and Rep. Robert Dickey | January 2014- April 2014

Legislative Intern

 Create legislative updates for mass distribution, track legislation, write legislative summaries, and assist with constituent requests

Experience

State Charter Schools Commission of Georgia (SCSC)

General Counsel (November 2019-Present)

- Direct and oversee ethics, compliance, and internal policy matters for the agency and provide advice, counsel, and legal support to the executive director and board of commissioners.
- Supervise compliance monitoring for state charter school governing boards, including developing and facilitating training on state and federal legal requirements in the elementary and secondary contexts.
- Draft, review, and negotiate contracts on behalf of the agency.
- Organize and direct the agency's petition evaluation process, including facilitating applicant interviews, formulating staff recommendations, and responding to commissioner inquiries.
- Ensure the agency's compliance with open records and open meeting requirements.

U.S. Department of Education, Office for Civil Rights (OCR)

Attorney Advisor (September 2014 – October 2019)

- Advised senior leadership on statutory and regulatory civil rights matters.
- Developed and supervised programming for the Employee Engagement Advisory Committee, the Racial Harassment Network, and served on the Department of Education's Diversity & Inclusion Council.
- Drafted, negotiated, and monitored resolution agreements between OCR and recipient institutions.
- Provided internal and external legal compliance training on the civil rights laws enforced by OCR.
- Led and supervised investigations of alleged non-compliance with the civil rights laws enforced by OCR and reviewed investigative findings for legal sufficiency.

DeKalb County School District

In-House Counsel (September 2013 - September 2014)

- Senior attorney advisor to the Superintendent on legal matters involving legislative and regulatory compliance, policy development, and employment law.
- Supervised and conducted employee relations investigations.
- Investigated and composed position statements for employment discrimination complaints filed against the district.
- Served as lead counsel in civil litigation involving federal employment discrimination, constitutional law, Georgia tort law, and contract disputes.

The Law Office of B. A. Thomas, LLC

Associate Attorney (May 2011- September 2013)

- Litigated administrative hearings pursuant to Georgia's School Law and Administrative Procedure Act in educator employment matters.
- Managed the firm's federal employment discrimination and state level appellate dockets.

Education

University of Georgia, School of Law: Juris Doctorate (May 2010) Spelman College: Bachelor of Arts (May 2005)

Katherine E. Manthey

EXPERIENCE

State Charter Schools Commission of GeorgiaDirector of Research and Evaluation2019 - PresentAtlanta, GA

- Implement and oversee the performance evaluation process of state charter schools in alignment with the agency's mission and school contract obligations
- Refine and adjust school performance metrics to align with changes to law, policy and/or researched best practices
- Draft board action item recommendations based on verifiable, reliable data and research, to inform highstakes decision making
- Design performance evaluation systems for agency service contracts and school support programs to demonstrate progress towards program goals
- Mine, clean and analyze datasets and prepare visually appealing dashboards and reports that convey complex data analysis in an easy to understand form for stakeholder consumption
- Identify research needs and manage agency research initiatives both internally and with third party institutions
- Develop data systems and processes to improve efficiency of tasks across agency divisions
- Collaborate with school leadership teams and other state agencies to further agency goals

State Charter Schools Commission of GeorgiaAcademic Accountability Manager2016 - 2019

Atlanta, GA

- Analyzed school academic performance data and drafted corresponding reports and presentations
- Managed agency staff in the development of annual accountability reports and projects
- Informed agency strategic planning by grounding decision-making in outcome data and research
- Designed and managed the development and maintenance of an accountability website resulting in transparent communications with stakeholders on school progress
- Led presentations as an expert in Georgia's academic accountability metrics at agency training events, statewide and national charter school conferences
- Developed and organized training opportunities for school personnel

State Charter Schools Commission of GeorgiaBusiness and Operations Manager2014 - 2016

Atlanta, GA

- Managed the agency budget, accounting procedures, and human resource operations
- Managed the agency intern program including schedules, assignments and quality of work product
- Performed monitoring site visits at schools to ensure operational compliance
- Oversaw test monitoring initiatives for state charter schools
- Assisted in coordinating in-house research projects and contracts with outside research vendors

Governor's Office of Student Achievement Evaluation Design Intern

Atlanta, GA

- Conducted quantitative and qualitative research and evaluation for Georgia's Race to the Top grant
- Facilitated focus groups and interviews with school, district, and state level staff
- Compiled literary reviews and analyzed large longitudinal data sets to construct a quantitative dashboard report on the State's efforts to turnaround the lowest-achieving schools

Continued Next Page

2014

State Charter Schools Commission

Software Development Assistant

Atlanta, GA

- Worked with staffers to create a risk assessment tool for monitoring charter schools
- Analyzed and tracked charter schools' operations, budgetary, and student performance data
- Reviewed charter school petition applications for technical, legal, and content requirements

MetalForming, Inc.

Peachtree City, GA

- Managed a market research effort for a new technology, resulting in additional funding for the project
- Managed the stand-up of a new company website, resulting in higher SEO ratings
- Assisted in drafting, editing, and successfully securing a Phase I NSF grant
- Created and trained coworkers on a project backlog system and document management system for tracking customer implementation and in-house development milestones continued next page

EDUCATION

Georgia Institute of Technology	Courses in Data Analytics	2019

Training in Advanced Excel, Python, JavaScript, HTML/CSS, API Interactions, SQL, Advanced Statistics, and Tableau among other things.

Emory University Certificate in Business Intelligence 2017

Training in Advanced Excel, SQL queries, and Tableau to collect, extract, mine, analyze, visualize and present data.

Georgia State University

Mas	ster of Public Policy (M.P.P.)	2014
Socio	al Policy	

Graduate Research Assistant Tuition Wavier and Scholarship recipient, GPA 3.90- *Leadership*: Graduate Teaching Assistant to a graduate level course of 40 students which included compiling and presenting course content- *Study Abroad*: Race, Gender and Class in Contemporary South Africa, an overview of housing and social policy implications - *Relevant Courses:* Research Evaluation, Applied Research and Statistics Methods, Organizational Behavior and Leadership and Urban Demography among others.

University of Georgia	Bachelor of Arts in Journalism (A.B.J.)	2009
	Public Relations	

HOPE Scholarship recipient, GPA 3.65, Cum Laude, Washington D.C. public relations agency tour selected participant-*Leadership*: Creative Consultants Account Executive, lead a team in creating a public image campaign for Clayton County School District- *Semester in D.C.*: Communications Intern at the National Geographic Society

ADDITIONAL INFORMATION

Additional Activities

- Georgia Education Policy Fellowship Program 2018-19 cohort
- GAAWARDS (Georgia's Academic and Workforce Analysis and Research Data System) Executive Researcher Committee member
- Regional Educational Laboratory Southeast Research Alliance member
- Emory's Center for Community Partnerships Field Data Collector
- English Institute Language Teacher in Argentina

2010 - 2014

George "Buzz" Brockway, III

EXPERIENCE

State Charter School Commission of Georgia, Atlanta, Georgia *Currently Serving as Commission Chair*

Georgia Center for Opportunity, Peachtree Corners, Georgia September 2018 – Present *Vice President for Public Policy*

- Responsible for strategic planning and management of the policy team.
- Responsible for advancing policy objectives with Elected Officials, State and Federal Agencies, and Policy Makers.
- Responsible for managing research staff and directing research projects.

Georgia House of Representatives, Atlanta, Georgia *State Representative*

- Chaired the Code Revision Committee (2018 2019).
- Vice-Chairman, Governmental Affairs Committee.
- Chairman, State Government Sub-Committee of Governmental Affairs.
- Chairman, Special Committee on LaVista Hills city-hood proposal.
- Member, Appropriations, Insurance, Economic Development and Tourism committees.
- Member, Film and Entertainment Sub-Committee of Economic Development and Tourism.

Felicity International, Inc., Lawrenceville, Georgia

September 2003 – Dec. 2018

January 2011 – January 2019

June 2019 – Present

Operations and Marketing Manager

• Responsible for day to day business operations of the company.

AWARDS

Champion for Children, Georgia Charter School Association: Atlanta, Georgia	2017
Legislator of the Year, Technology Association of Georgia: Atlanta, Georgia	2015
Solar Star, Georgia Solar Coalition, Atlanta, Georgia	2015
Legislative Service Award, Georgia State Retirees Association: Atlanta, Georgia	2014
Legislative Champion for Choice, American Federation for Children: Atlanta, Georg	gia 2014

EDUCATION

Georgia Institute of Technology , Atlanta, Georgia Bachelor of Science in Management Science Certificate in Economics	1988 – 1990
Gainesville College, Gainesville, Georgia	1986 – 1988
VOLUNTEER WORK	
Capitol Jackets, Atlanta, Georgia Victory Church, Marriage Ministry, Buford, Georgia	2019 – Present 2013 – Present

Updated May 2022

Curriculum Vitae

Adria N. Welcher



Education

Emory University, Atlanta, GA Ph.D., Sociology, May 2013

Stanford University, Palo Alto, CA A.M., Sociology, June 2002

University of Michigan, Ann Arbor, MI M.A., Higher Education, December 2000

Spelman College, Atlanta, GA B.A., Theatre, May 1999 Cum Laude with Mathematics Minor

Academic Positions

Fall 2015- Current	Morehouse College, Assistant Professor of Sociology Atlanta, GA Introduction to Sociology, Social Problems, The Family, Women in Society, Criminology, Social Research Methods, Seminar in Sociology, Principles of Sociology, Educational Inequality J-mester Course, Black Middle Class Dilemma J-mester Course, Juvenile Delinquency, Race and Ethnic Relations, Directed Studies, Criminal Justice Internship, Internship/Fieldwork in Sociology
Fall 2012- Summer 2015	Georgia Gwinnett College , Assistant Professor of Sociology, School of Liberal Arts Lawrenceville, GA
Spring 2011	Independent Instructor , School of History Technology and Society, Ivan Allen College, Georgia Institute of Technology <i>Sociology of Education</i> <i>Social Problems</i>
Fall 2010	Independent Instructor , Departments of Sociology and African American Studies, Emory University <i>Race and Ethnic Relations</i>

Administrative Positions

Fall 2021- Current	Chair, Admissions Committee, Morehouse College
Fall 2019 -	PR/Award # S282A220006 Director of General Education, Morehouse College Page e107
Current	

Fall 2019 - Current	Department Chair/Academic Program Director, Sociology, Division of Social Sciences and Cultural Studies
Spring 2018- Spring 2019	Coordinator, Service-Learning Training, General Education Transition, Morehouse College, Atlanta, GA
Fall 2017 - Current	Department Coordinator , SouthEastern Undergraduate Sociological Symposium, 35 th , 37 th and 39 th Annual Proceedings
Fall 2017- Spring 2021	Member, Elections Committee, Morehouse College, Atlanta, GA
Spring 2017- Fall 2017	Member, SACS COC Educational Programs Committee, Morehouse College, Atlanta, GA
Fall 2016 - Current	Member, Sociology Department Course Scheduling Committee, Morehouse College, Atlanta, GA
Fall 2016- Fall 2019	Member, Curriculum and Educational Policy Committee, Morehouse College, Atlanta, GA Vice Chair, Fall 2017 – Fall 2019
Fall 2016- Current	Member, Institutional Review Board, Morehouse College, Atlanta, GA Co-Chair, Fall 2016 – Fall 2018
Fall 2016- Current	Parliamentarian (of the Faculty), Morehouse College, Atlanta, GA
Spring 2014- Spring 2015	Chair , Part-time Sociology and Religion Instructor Hiring Committee, Georgia Gwinnett College, Lawrenceville, GA. Reported to the Dean of the School of Liberal Arts and hired part time faculty members for disciplines of Sociology.
Fall 2010- Spring 2011	Graduate Assistant , Emory University Race and Difference Initiative. Reported to Race and Difference Initiative Directors. Developed and coordinated University-wide programs and speaker series. Organized and arranged visits of distinguished invited guests and visiting scholars. Facilitated graduate student network of communication and collaboration across schools.
2008-2009	Associate Director, Morehouse Male Initiative, Morehouse College. Constructed survey instruments for study on academic success of black males. Developed research design and coordinated research project on campuses throughout the United States. Supervised undergraduate student staff.
2006-2008	Graduate Assistant , Emory College Office for Resources and Planning. Assisted with various data analyses for the College, including annual program evaluation. Served as Research Coordinator on Emory College Retention Study.

Publications

2014	Regine Jackson, Kathryn Sweeney, and Adria Welcher. "It Just
	Happens: Undergraduate Explanations for Lack of Student Interaction Across
	Race Lines." <i>Education, Citizenship, and Social Justice</i> . November 2014 9(3):
	191-208.
	PR/Award # S282A220006
2013	Davis, Tomeka and Adria N. Welcher. "School Quality and the

Vulnerability of the Black Middle Class: The Continuing Significance of Race as a Predictor of Disparate Schooling Environments." <u>Sociological Perspectives</u> 56(4):467-593

2008 Agnew, Robert, Shelley Keith Matthews, Jacob Bucher, Adria N. Welcher, and Corey L.M. Keyes. "Socioeconomic Status, Economic Problems, and Delinquency". *Youth and Society* 40(2):159-181.

Grants and Fellowships

2020-2021	Bonner Foundation Community-Engaged Learning Initiative Grant
2020-2021	Textbook Transformation Grant/HBCU Academic Librarians OER Project (with Dr. Kimberley Bugg of Atlanta University Center Woodruff Library)
2020	Associated Colleges of the South (ACS) Rapid Grant for Advancing Pandemic Pedagogies (Working group led by Dr. Monique Earl-Lewis with group members – Dr. Samuel Livingston (Morehouse), Dr. Corrie Claiborne (Morehouse), Dr. Sulayman Clark (Morehouse), Mr. Justin de la Cruz and Mrs. Patrice Williams (Atlanta University Center Robert W Woodruff Library)
2011	Emory University Mellon Foundation Graduate Teaching Fellowship Recipient (\$23,500)
2010	Laney Graduate School Professional Development Funds (\$7560)
2010	Emory University Race and Difference Initiative Seed Grant (\$200)
2010	Emory University Mellon Foundation Graduate Teaching Fellowship Alternate
2005 - 2010	Emory University Arts and Science Fellowship
2001 - 2003	Stanford University Graduate Diversity Fellowship
1999 – 2000	University of Michigan Horace H. Rackham Education Master's Award Recipient

Honors and Awards

2019-2021	Whisenton/Kettering Foundation Public Scholar
2012-2013	Teacher of the Year Nominee, Georgia Gwinnett College
2011	Thank a Teacher Program, Center for the Enhancement of Teaching and Learning, Georgia Institute of Technology
2002 - 2003	Most Active Graduate Student, Black Community Services Center, Stanford University
1995 – 1999	Dean's Scholarship (Full Tuition), Spelman College
1995 – 1999	Georgia HOPE Scholarship Recipient, Spelman College
1998 – 1999	Mortar Board, The Senfor Honder State 9,05 pelman College Page e109

Manuscripts and Grant Proposals in Progress

- National Opinion Research Center AmeriSpeak Omnibus Survey Morehouse Spelman COVID-19 focused project submitted March 2021.
- National Science Foundation Smart and Connected Communities Grant, Atlanta's Last Mile Micro-Mobility Citizenship, Equity Zones and Uneven Built Environment", submitted September 6, 2019.
- Welcher, Adria N. and Regine O. Jackson. "Race, Space and School Choice: Consequences of Wealth Inequality for Middle Class Blacks in Atlanta."
- Welcher, Adria N. and Tomeka Davis. "Head of the Class: An Analysis of Black and White Middle Class Students, the Schools They Attend, and Their Academic Achievement."
- Welcher, Adria N. and Irene Browne. "Race, Social Class, and Mobility Strategies: Comparing Middle-class African American and Dominican Parents in Atlanta."

Invited Presentations and Papers

2020	Invited Panelist, Changing the Narrative on Violence Against youth: A Panel Discussion on Leveraging Efforts of Mulitple Sectors to Change the Narrative and Prevent Violence Against Youth, CDC National Center for Injury Prevention and Control DVP's Youth Violence Prevention Work Group, April 15.
2019	Invited Expert, While Black Podcast, March 16.
2019	Invited Panelist, PBS Newshour, Baby Bonds Episode.
2018	Invited Panelist , "Applied Sociology Workshop: Preparing Students for Careers in Sociology and Criminal Justice." Georgia Sociological Association, Columbus, GA, October 20.
2018	Invited Expert, Dekalb County Youth Commissioners Lecture Series, October 16.
2018	Invited Expert, City of Chattanooga Department of Multicultural Affairs Fair Housing Conference, April 20, Chattanooga, TN.
2018	Invited Panelist , Juggling Graduate School Work and Family, 81 st Annual Meeting of the Southern Sociological Society, April 5, New Orleans, LA.
2017	Invited Expert, Dekalb County Youth Commissioners Lecture Series, November 7.
2017	Invited Expert, On Point NPR Series, Middle Class on Tour. October 27.
2017	Invited Expert, A Seat at the Table PBS Series, Stay Woke Episode. PR/Award # \$282A220006
2016	Invited Expert, On Second ThBaght CPB News/NPR Series, Women Behind

Bars Episode.

- 2015 **Invited Panelist**, #WCW: Women Conquering the World: How a Mother's Journey to Success Never Stopped", Spelman Association for Maternal Support, Spelman College.
- 2014 Invited Expert, Promises Kept: Raising Black Boys to Succeed in Schools and Life (Random House), Companion Book to Documentary *American Promise*.

Conference and Other Presentations

2021	Invited Presenter, Bonner Summer Leadership Institute, Online, Re-Imagining First Year Experience Courses: From Education to Engagement, June 7-8.
2020	Invited Panelist, Suburban Schools, Urban Realities Conference, Washington University, St. Louis MO, March 25-27 (postponed due to COVID-19).
2019	Invited Panelist, Author Meets Critic: <u>White Kids: Growing Up Privileged in a</u> <u>Racially Divided America</u> by Margaret Hagerman, Presented at the 82 nd Annual Meeting of the Southern Sociological Society, Atlanta, GA, April 12.
2019	Invited Panelist, <i>Communicating Research with Media</i> , Critical Juncture Conference: Exploring the Intersections of Race, Gender, and Disability Emory University, Atlanta, GA, April 6.
2019	Invited Lecturer, <i>African American Family</i> course, Johns Hopkins University, Dr. Kali-ahset Amen Strayhorn, April 4
2019	Invited Expert, If Starbucks is Bought by Nestle', Please Don't Arrest Me: A Discussion on Race, Identity, and Democracy in the United States, Trinity University, San Antonio, TX, February 7.
2018	Faculty Research Café, "Chasing the Dream: Housing Decisions Among Black Middle Class Families." Morehouse College, September 7.
2018	"Chasing the Dream: Housing Decisions Among Black Middle Class Families." Presented at the 81st Annual Meeting of the Southern Sociological Society, New Orleans, LA, April 5.
2017	Invited Moderator, "Black Lives Matter: A Conversation with the Church" Panel Discussion, First Baptist Church of East Point.
2017	Invited Expert, Les Noir: Understanding the Black Middle Class Dilemma, Kameron Bain, Africana Digital Ethnography Project, Morehouse College.
2016	Invited Panelist, Author Meets Critic: <u>Despite the Best Intentions: How Racial</u> <u>Inequality Thrives in Good Schools by Amanda Lewis and John Diamond</u> , Presented at the 79 th Annual Meeting of the Southern Sociological Society, Atlanta, GA, April 14.
2014	Discussion Leader at Georgia Gwinnett College Common Reading Initiative Coffee and Conversation. Lawrenceville, GA, November 12.
2014	Presented at the Ferguren Manters 28262000 Discussion Organized by the Georgia Gwinnett College Psycholog a Gelab. Lawrenceville, GA, September 23.

2013	"Building Intellectual Capital: The Academic Boot Camp." Presented at the 2013 UNCF/Mellon Programs Conference. Atlanta, GA, October 4.
2012	"Evaluating Race Against Class As Predictors Of Disparate Schooling Environments." Presented at the 2012 Annual Meeting of the Association of Black Sociologists, Denver, CO, August 16.
2010	"Colorblind Ideology and Undergraduate Explanations for Lack of Interaction Across Race Lines." Presented at the 60 th Annual Meeting of the Society for the Study of Social Problems, Atlanta, GA, August 15.
2009	"Identifying and Addressing Higher Education Climate Concerns," International Faculty Workshop at Western Galilee College (WGC), Akko, Israel, June.
2009	"Improving Experiences of Undergraduate International Students," Catholic University of Lublin (KUL), Lublin, Poland, March.
2009	"Head of the Class: An Analysis of Black and White Middle Class Students, the Schools They Attend, and Their Academic Achievement." Presented at the Annual Meeting of the Association of Black Sociologists, New Orleans, LA, June 19.
2008	"Head of the Class: An Analysis of Black and White Middle Class Students, the Schools They Attend, and Their Academic Achievement." Presented at the Annual Meeting of the American Sociological Association, Boston, MA, August 4.

Research Experience

2016-2018	Consultant,	Mosaic	Community	/ Planning,	Atlanta,	GA.
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- 2008-2016 **Contracted Researcher**, Science Applications International Corporation. Contributed to designing interview guide and facilitated focus groups.
- 2007-2009 **Research Assistant**, Department of Sociology of Emory University. Supervisor: Dr. Irene Browne. Recruited participants and developed research guide on Latino Discrimination Project.
- Spring 2006 **Research Assistant**, Department of Sociology and Rollins School of Public Health of Emory University. Supervisor: Dr. Kathryn Yount. Prepared statistical data for Egyptian Women Research Project.
- Summer Contracted Researcher, University of Michigan Pathways to Student Success and 2003 Excellence Program, Office of Academic Multicultural Initiatives. Analyzed and compiled focus group responses. Performed statistical analyses of end of the year evaluations.
- SummerResearch Assistant, Sociology Department of Stanford University, Supervisor: Dr.2002Michael Rosenfeld. Traced history of miscegenation law in the United States.
- 2002-2003 **Research Assistant**, Human Biology Department of Stanford University, Supervisor: Drs. Don BappandaStans22/200260nducted focus groups and interviews of first year pre-medical studentage e112

Professional Development

2020	National Academic Advising Association (NACADA) HBCU Advising Summit; New Orleans, LA
2019	National Academic Advising Association (NACADA) Annual Conference; Morehouse College ADISA Cohort #2 Member
2019	General Education Syllabus Development Workshop, Morehouse College.
2016	Faculty Development Workshops, Faculty Development Center, Morehouse College.
Spring 2014	The Peak Performing Professor, Center for Teaching Excellence, Georgia Gwinnett College.
Winter 2014	Winter Teaching Excellence Institute: How Learning Works, Center for Teaching Excellence, Georgia Gwinnett College.
2013	Graduate Assistant, UNCF/Mellon Summer Institute. Emory University, Atlanta, GA, June 2 – 28.

Professional Service

2021	Mentor, UNCF/Mellon Mays Undergraduate Fellow, Caleb Strickland.
2020	Member, Committee on Racial and Ethnic Minorities, Southern Sociological Society
2019	Dissertation Committee Member , Melissa Waller, Penfield College, Counselor Education and Supervision Program, Mercer University
2018	Mentor, UNCF/Mellon Mays Undergraduate Fellow, Anthony Felder
2017-Current	Reviewer , Sociology of Race and Ethnicity Journal, Acta Sociologica, Journal of Public and Professional Sociology
2017 – 2020	Dissertation Committee Member , "Justice and Status Processes in the Classroom and their impact on Students' Identities and Aspirations: A Mixed- Method Study of the influence of justice and status processes on students' science identities and aspirations, Jennifer Hayward, Emory University, defended August 10, 2020
2017	Mentor, UNCF/Mellon Mays Undergraduate Fellows, Jordan Mosby and Nzali Scales
2016-Current	Member, Curriculum and Educational Policy Committee, Morehouse College
2015-2016	Member, Local Arrangements Committee, Southern Sociological Society, Atlanta, GA
2014-2015	Member, Common Reading Initiative Committee, Georgia Gwinnett College
2014-2015	Member, Institutional Review Board Confimittee, Georgia Gwinnett College Page e113

Professional Memberships American Sociological Association Association of Black Sociologists Southern Sociological Society National Academic Advising Association (NACADA)

C. Douglas Erwin, Jr., CPA



Introduction

Currently and for the past twenty-six years have been the owner of a public accounting firm licensed in the state of Georgia. During the past twenty-one years have developed an expertise working with charter schools performing audits, taxation, and consulting services.

Audit Services

Charter schools are required by state law to obtain an annual audit of their financial statements. I have performed hundreds of these audits to meet the requirements of charter school authorizers and the Georgia Department of Education. In addition, when required I have performed Federal audits known as Single Audits where federal grants exceed a threshold of \$750,000 in a year.

Taxation Services

I provide tax preparation services for many different types of returns including individual tax returns, corporate, partnership, estate, and non-profit tax returns. For charter schools and other non-profits I prepare the form 990 tax return required by the Internal Revenue Service to maintain tax exempt status.

Consulting Services

I provide many different types of consulting services to individuals, corporations, partnerships and non-profit organizations. In the charter school/non-profit areas I have provided the following services:

- •Assistance with setting up chart of accounts to meet requirements of state accounting office
- •Outsourced services including payroll services, accounts payable, cash management, financial statement preparation.
- •Forensic type services for failing schools.
- Providing monthly financial statements to the governing board.
- •Preparing the budget and actual results in a 64-digit text code in a format known as the DE046.
- •Assistance with recoupment of overpaid sales taxes, payroll taxes, and excise taxes
- •Assistance with budget preparation
- •Obtain payroll tax, sales tax, and FEI numbers from governmental agencies ensuring that schools are properly setup.
- •Incorporation services
- •Feasibility studies required for US Department of Agriculture loan programs for facility construction.

- •Submissions to MRSB system used where municipal bond funding is used to report financial results.
- Preparation of financial data required for bond funding.
- Application to Internal Revenue Service for tax exempt status (501c3).

Other Experience

I have provided accounting, audit, tax, and advisory services to other non-charter school clients including businesses in such diverse areas as:

- City governments
- 40lk plans
- Textile manufacturing
- Fertilizer trailer manufacturing
- National restaurant chain and food manufacturing company
- Cold storage facilities
- Residential construction contractors
- Non-profits such as food and clothing banks
- Concrete manufacturing
- Accounting services to a West African diamond broker
- State of Georgia DOT non-emergency transportation provider
- US FAA airport manager with operations in 21 airports and Bermuda
- Mortgage banking including Chicago based Fannie Mae seller/servicer with \$450 Million portfolio and numerous mortgage brokers
- Property managers
- Courtroom testimony as an expert witness

CFO Services

I have functioned as CFO and operated a back-office accounting function for several businesses including a United States Department of Energy National Renewal Energy Laboratory project which manufactured activated carbon from peanut shells, a manufacturer of wing and tail stands for the aviation industry which customers which included American Airlines, Delta Airlines, FedEx, and the United States Air Force.

State Charter Schools Commission Foundation

I currently provide accounting services for the State Charter Schools Foundation which involves posting all accounting transactions and the annual budget, reconciling accounts, and preparing financial statements on a monthly basis for the management and governing board.

Licensure & Membership Summary

My firm is licensed by the states of Georgia and Alabama board of accountancy to perform audits. I am a member of the American Institute of CPAs, Georgia Society of CPAs, Alabama Society of CPAs, the AICPA Governmental Audit Quality Center, and the AICPA Employee Benefit Plan Audit Quality Center. I obtained a B.A. in Accounting from Auburn University in 1990.

James "Ted" Beck

Education

MASTER OF PUBLIC ADMINISTRATION | GEORGIA STATE UNIVERSITY

• Major: Public Administration (Minor: Policy Analysis and Evaluation)

BACHELOR OF SCIENCE | INDIANA UNIVERSITY EAST

• Major: Mathematics

BACHELOR OF ARTS | UNIVERSITY OF GEORGIA

• Major: Journalism (Minor: English)

Experience

EXECUTIVE DIRECTOR OF INTERNAL AUDIT | UNIVERSITY SYSTEM OF GEORGIA | 2021 - PRESENT

- Led a team of auditors and provided oversight and guidance to a distributed internal audit function covering 26 higher education institutions and several administrative units.
- Provided direct audit coverage and consulting services to 12 higher education institutions, to include relationship management with institution leadership as a means of identifying projects which would provide the most positive impact to the organization's operations.
- Developed and implemented risk-based audit plans designed to identify and prioritize evolving impediments to the organization and enterprise's strategic objectives.
- Interpreted and applied USG policies and procedures, state and federal laws, and other regulatory guidance to institution operations, identified instances of non-compliance, and provided recommendations for remediation and other solutions to noted problems.
- Served as the lead for a variety of assurance audit engagements, including compliance, financial, operational, and information systems, from planning and identification of resources to reporting and stakeholder communications.
- Conducted consulting engagements by identifying management needs and interests, and by developing intraorganizational relationships with subject matter experts and other relevant stakeholders.
- Designed and implemented automated controls testing and data analytics processes used to minimize staff time dedicated to repeatable testing procedures.
- Presented findings and other recommendations to individuals ranging from institution presidents and board members to managers and line staff by ensuring reports and other communications were appropriate to the audience and focused on most pertinent information.
- Responsible for administrative functions of office, to include budget development and monitoring, human capital management, expense approvals, and representing department in organization and external meetings.

BUDGET MANAGER | UNIVERSITY SYSTEM OF GEORGIA | 2020 - 2021

- Provided detailed analysis of University System Office budget resources and deployment to executive leadership and department managers.
- Developed analytical financial products to explain cost drivers, long-term liabilities, commitments and other needs, and revenue stream processes to various stakeholders.
- Administered and executed budget directives through the fiscal year cycle, to include development, intra-year analyses, and year-end reporting.

- Oversaw the budget administration of a nearly \$100 million information technology unit which provided services to 26 higher education institutions and over 500,000 faculty, staff, and students.
- Helped develop and administer a chargeback model to allocate the costs of large enterprise IT contracts and services across all member institutions.

CHIEF FINANCIAL OFFICER | GEORGIA DEPARTMENT OF EDUCATION | 2015 - 2020

- Led a 100-person team responsible for all financial and administrative aspects of the largest state agency by state funding, including finance, accounting, budget, grants administration, human resources, facilities, transportation, and other ancillary departmental services.
- Reported directly to a constitutionally elected officer and a 14-member board appointed by the Governor by representing all c-level functions related to finance and department operations.
- Responsible for the allocation of the state's public education funding formula, dispersing \$11 billion to over 200 individual school districts, serving over 1.7 million students and more than 250,000 school staff.
- Represented the department to executive and legislative branch stakeholders for the purposes of budget and policy development, including the annual appropriations act and other lawmaking activities.
- Administered the agency's programmatic budgets and financial activities, including reconciliation of all annual fiscal transactions and financial reporting requirements, including ACFR and other mandatory reports.
- Maintained a complex information technology environment consisting of multiple enterprise applications related to accounting, financial reporting, budget, grants management, and treasury functions.
- Acted as point of contact for all audit and other financial compliance functions to both internal and external reviewers.
- Directed and completed several information technology projects, including dashboard and financial reporting applications with public-facing components, and rewrites and upgrades to other platforms within the existing enterprise portfolio.
- Led department through multi-year budget reduction process resulting from statewide economic contractions by analyzing all expenditure and projected financial commitments. Recommended strategically focused reductions which minimized impact upon core functions and priorities.
- Developed multiple forecasting models describing the anticipated behavior and trends of the state's \$11 billion public education formula, which was used by executive and legislative branch budget writers to plan for out-year revenue and appropriation needs across multiple budget cycles.

DIVISION DIRECTOR | GOVERNOR'S OFFICE OF PLANNING AND BUDGET | 2015 - 2015

- Led a team of budget and policy analysts.
- Responsible for managing the budget development, implementation, and monitoring process for over \$12 billion in state funds (55 percent of the state's total budget) appropriated annually to state agencies with an education mission, ranging from pre-K, K12, post-secondary, and scholarship-granting organizations.
- Participated as lead staff on the Governor's Education Reform Commission by assisting in the development of a K12 funding formula driven by student characteristics rather than historical cost-assessment models.
- Provided analysis of legislation and other proposed changes to state law, to include financial and operational impact.
- Developed, tested, and implemented financial models and time series forecasts for service areas such as postsecondary tuition revenue streams, statewide scholarship programs, pre-K attendance by geographic regions, and population growth and inter-population shifts among K12 funding categories.

AUDIT MANAGER | UNIVERSITY SYSTEM OF GEORGIA | 2011 - 2015

- Promoted from original position as senior auditor. Led audit projects and other special assignments such as risk assessments, assurance engagements, and policy and strategy initiatives.
- Designed and executed enterprise audit engagements, such as examination of every admissions decision over a three-year period for all USG institutions to test for compliance to established policies, business procedures, and other requirements.

- Developed and applied financial metrics and ratios informed by enterprise accounting system data and annual financial statements describing liquidity, reserves management, viability of debt management, and revenue and expense models to monitor the fiscal condition of over 20 USG institutions.
- Assisted in the design, development, and execution of automated computer assisted auditing techniques and continuous auditing tools by extracting and analyzing data from enterprise resource planning applications for both financial operations and student data.
- Analyzed general ledger and accounts payable transaction data for compliance with state spending regulations by developing and implementing queries and reports within the enterprise accounting system (Oracle PeopleSoft) for 28 USG institutions.
- Provided opinions on the fiscal viability of various USG programs and departments by analyzing historical budget and expense data, and presenting cost models and spending projections to executive leadership, including the Chancellor.

POLICY COORDINATOR | GOVERNOR'S OFFICE OF PLANNING AND BUDGET | 2005 - 2011

- Promoted through a series of progressively responsible positions: intern, associate analyst, senior analyst, communications manager, and deputy division manager (policy coordinator).
- Provided analysis of agency financial operations to executive leadership, to include the Governor.
- Established key working relationships with external agency leadership and represented the Governor's Office and the executive branch in analyzing and recommending agency budget requests.
- Directed enterprise evaluations of agency programs and operations for the purposes of identifying instances of service duplication or efficiencies which could be recognized through restructuring existing operations in order to better allocate state resources to strategic objectives.

Professional Certifications

CERTIFIED INTERNAL AUDITOR

• The Institute of Internal Auditors: 2014

CERTIFICATION IN RISK MANAGEMENT ASSURANCE

• The Institute of Internal Auditors: 2021

CERTIFIED ENTRY-LEVEL PYTHON PROGRAMMER

• Python Institute: 2019

GEORGIA STRATEGIC CHARTER SCHOOL GROWTH INITIATIVE

A PROPOSAL FOR FY2022 CSP GRANTS TO STATE ENTITIES

Presented by the State Charter Schools Foundation of Georgia

PART 7: OTHER ATTACHMENTS – APPENDIX F

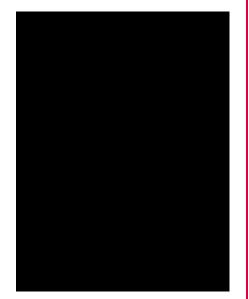
Additional Information

- Charter Growth Initiative Evaluation for Replication and Expansion
- Charter Growth Initiative Replication Self-Assessment
- Charter Growth Initiative Replication-Expansion Application
- Charter Growth Initiative Target Communities
- Charter Schools Act of 1998
- GaDOE School Closure Protocol
- GaDOE Subgrant Monitoring Checklist
- GCSA Facility Resource Center
- GCSA Press Release Charter Growth
- GCSA Press Release Charter Support (3)
- GCSA Press Release Graduation Rate
- GCSA Press Release Voters
- Georgia Authorizer Evaluation Rubric
- Georgia Milestones Results 2019-2022
- Georgia Milestones Results 2021-2022
- Georgia Milestones: SCSC with District 2022
- Georgia Principles and Standards for Charter School Authorizing
- Georgia Principles and Standards for Charter School Authorizing Overview
- Georgia Standards for Quality Charter School Authorizing Evaluation: Relevant Documents Table
- Georgia Standards for Quality Charter School Authorizing Evaluation: School Survey
- Georgia Standards for Quality Charter School Authorizing Evaluation
- GSU Economic Impact Presentation
- GSU Report 1
- GSU Report 2
- GSU Report 3
- GSU Report 4
- SCSC Accountability
- SCSC Comprehensive Performance Framework
- SCSC Expedited Review
- SCSC Petition Evaluation Guide
- SCSC Petition Review Process
- SCSC Replication and Expansion Guide
- SCSC School Suspension Closure Guide
- State Board of Education Rules for Charter Authorizing









PR/Award # S282A220006

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Replication and Expansion Cohort Program 2022-23

Application Evaluation Form

Evaluator Name	Evaluator Title
School/Applicant Name	Evaluation Date

Evaluation Instructions:

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* Please evaluate each criteria using scale from 1 to 10 where 1 is lowest and 10 is highest.

* Please list any comments in the box below each criteria.

* On a scale of 1 to 10, where 1 is lowest and 10 is highest, how would you rate the "Responsiveness to community need" ? Applicants planning to locate in one of the SCSC's geographic priority areas will be given priority for this cohort program. Applicants proposing to expand or replicate in an area of high charter school concentration must demonstrate community need for the unique model proposed. No applicants planning to replicate or expand within the City of Atlanta or Atlanta Public Schools will be considered for this cohort program.								
$\begin{bmatrix} 1 \\ -1 \end{bmatrix} \begin{bmatrix} 2 \\ -1 \end{bmatrix} \begin{bmatrix} 3 \\ -1 \end{bmatrix} \begin{bmatrix} 4 \\ -1 \end{bmatrix} \begin{bmatrix} 5 \\ -1 \end{bmatrix} \begin{bmatrix} 6 \\ -1 \end{bmatrix} \begin{bmatrix} 7 \\ -1 \end{bmatrix} \begin{bmatrix} 8 \\ -1 \end{bmatrix} \begin{bmatrix} 9 \\ -1 \end{bmatrix} \begin{bmatrix} 10 \\ -1 \end{bmatrix}$								
Comments:								
* On a scale of 1 to 10, where 1 is lowest and 10 is highest, how would you rate the "Growth mindset "? Applicants should demonstrate their interest in expanding (number of seats and/or additional grade band) or replicating (opening a new school based on the existing model) within the next 2-5 years. Priority will be given to schools currently eligible to expand or replicate through their authorizer or the State Charter Schools Commission of Georgia (if a local authorizer). Applicants should also express their willingness to engage in open, transparent conversations with technical assistance providers and to welcome feedback with an open mind.								
1 2 3 4 5 6 7 8 9 10 Comments:								

* On a scale of 1 to 10, where 1 is lowest and 10 is highest, how would you rate the "Commitment" ? During Phase I technical assistance, applicants must demonstrate their willingness to devote at least 5 hours per week to meetings, convenings, and "homework." Applicants must agree to attend one out-of-state convening and pay for travel expenses. During Phase II technical assistance, applicants must designate a primary contact who will be responsible for attending inperson convenings, traveling to other schools, and communicating with technical assistance providers.

		2	3	4	5	6	7	8	9	10	
Comme	nts:										

* On a scale of 1 to 10, where 1 is lowest and 10 is highest, how would you rate the "Readiness"? Applicants must demonstrate their readiness to plan for and implement expansion or replication. The evaluation team will review current and historical academic and operational performance, eligibility for expansion or replication, and mitigating factors. This cohort program is intended to support schools are various stages of readiness, but the applicant should demonstrate a thought-out initial plan.

		2	3	4	5	6	7	8	9	10	
Comme	nts:		•					•			
Total Po	ints:										

Overall/Additional Comments:







READY TO REPLICATE?

Charter school replication, or opening a new charter school or a new campus of a high-quality charter school of an existing high-quality charter school, allows high-quality charter schools to expand their impact and experiment with new adaptations on their models.

The Charter Growth Initiative aims to increase the number and diversity of high-quality schools in Georgia by growing the capacity of existing charter schools to extend their impact through the creation of additional campuses. Schools considering replication should carefully consider the questions on the Charter Growth Initiative Readiness Self-Assessment below.

Eligibility: Schools must answer "Yes" on all questions to be eligible to apply.

- Does the school currently operate between one and three campuses?
- □ Are all campuses in good standing with their authorizer(s)?
- □ Can the school demonstrate three years of positive performance data in the following areas for three consecutive years:
 - **Academics**: Is the school providing its students with a better educational opportunity as demonstrated by outperforming the schools/districts in its attendance zone through CCRPI indicators¹?
 - Finance: Has the school received a clean financial audit for the past three years?
 - **Operations**: Is the school fulfilling its legal obligations as demonstrated through positive compliance performance?

Eligible schools should consider the following questions to assess readiness for replication.

School Capacity:

- Is the current school in a stable position as it relates to school leadership, governing board, authorizer status, educational model, operational compliance and its financial position?
 - School Leadership a replicating leader should have at least 2 years in their current position or a track record of successful replication.
 - Governing Board a governing board should not have excessive unplanned turnover.
- Are all members of the school leadership team prepared to commit significant time each month to its replication efforts?

Organizational Structure:

- Will the school replicate under the same board or a new board?
- Who will oversee the replication effort?
- How will the existing leadership structure change with a new school? Is an existing leader at the school prepared to spearhead the new campus, or will the school recruit a new leader?
- Will shared school services be housed in a "central office"? Will the schools establish an MOU with the central office?
- Will the school's obligations to its authorizer change with the addition of a new campus?

¹ CCRPI indicators including Single Score, Grade Band Score, Content Mastery, Progress.







Finances:

- Is the school's financial position sound? How will the financial position change with the opening of a new campus?
- Can the school use its existing funds to support the replication effort?
- Will the school receive the same per-pupil funding for the replication school?

Community Demand:

- Is there specific evidence from the community of an interest in a new campus?
- Will the replicating campus serve a similar student population or a different community?
- Will the replicating campus serve a different attendance zone than the original school?



Replication and Expansion Cohort Program 2022-23

Thank you for your interest in the Georgia Strategic Charter School Growth Initiative! The Georgia Strategic Charter School Growth Initiative (Charter Growth Initiative) is a partnership between the State Charter Schools Foundation of Georgia, State Charter Schools Commission of Georgia, and Georgia Charter Schools Association with the purpose to expand charter school opportunities for Georgia's children. The Charter Growth Initiative provides information about charter schools to Georgia and offers technical assistance and grants to support the expansion and creation of charter schools, including cohort programs for charter schools.

The Replication and Expansion Cohort program will include long-range planning and guidance on scaling the organization, facility and financing technical assistance, petition creation/modification support, and up to \$300,000 in grants to assist with planning and implementation activities. All current Georgia charter schools that are in good standing with their authorizer may apply. Eligible schools must plan to replicate or expand in communities that do not already have a high concentration of charter schools as defined by the <u>SCSC's FY22 Petition Priorities</u>. Applications are due by July 15, 2022. Please send all required application documents as attachments to info@findagacharter.org by 5:00 p.m. EST.

rimeline		
July 15, 2022	Applications due	
July 25-27	Applicant interviews (as needed) – in-person or virtual	
August 8	Cohort selected and notified	
Week of August 29	Cohort kick-off	
September 19, 2022 –	Phase I technical assistance – long-range planning, scaling,	
December 12, 2022	facilities, finance (expect 5+ hours/week of engagement plus sch assignments)	
	Provided by Bellwether Education Partners & Georgia Charter Schools Association's Facility Resource Center	
	Cohort participants eligible for \$50,000 grant at the successful completion of Phase I	
January 9 – September 30, 2023	Phase II technical assistance – petition planning, preparation, and submission for ready schools and planning services for all other schools	
	Provided by Georgia Charter Schools Association's Incubator	
	Cohort participants eligible for \$250,000 grant upon successful	
	petition/expansion approval	
September 30, 2023	All grant funds expended	

Timeline







Selection

Participants for this cohort program will be selected through a competitive process. Applications will be reviewed by representatives from the Charter Growth Initiative partnership. The application review team reserves the right to schedule an interview with perspective applicants to assess their readiness to participate in the cohort.

To be eligible, applicants must be a charter school/operator with at least one operational charter school in Georgia and remain in good standing with their existing charter school authorizer. Charter schools may be authorized by a local school board or the State Charter Schools Commission of Georgia, and they may seek petition approval from any charter school authorizer in Georgia.

Participants will be selected based on the following criteria:

- **Responsiveness to community need** Applicants planning to locate in one of the <u>SCSC's geographic priority areas</u> will be given priority for this cohort program. Applicants proposing to expand or replicate in an area of high charter school concentration must demonstrate community need for the unique model proposed. *No applicants planning to replicate or expand within the City of Atlanta or Atlanta Public Schools will be considered for this cohort program.*
- Growth mindset Applicants should demonstrate their interest in expanding (number of seats and/or additional grade band) or replicating (opening a new school based on the existing model) within the next 2-5 years. Priority will be given to schools currently eligible to expand or replicate through their authorizer or the State Charter Schools Commission of Georgia (if a local authorizer). Applicants should also express their willingness to engage in open, transparent conversations with technical assistance providers and to welcome feedback with an open mind.
- Commitment During Phase I technical assistance, applicants must demonstrate their willingness to devote at least 5 hours per week to meetings, convenings, and "homework." Applicants must agree to attend one out-of-state convening and pay for travel expenses. During Phase II technical assistance, applicants must designate a primary contact who will be responsible for attending in-person convenings, traveling to other schools, and communicating with technical assistance providers.
- Readiness Applicants must demonstrate their readiness to plan for and implement expansion or replication. The evaluation team will review current and historical academic and operational performance, eligibility for expansion or replication, and mitigating factors. This cohort program is intended to support schools are various stages of readiness, but the applicant should demonstrate a thought-out initial plan.

Georgia Strategic Charter School Growth Initiative

Replication and Expansion Cohort Program

Application

- Primary Participant Information Name: Role: Email:
- 2. What type of growth are you currently considering? (please select all that apply)
 □ Vertical Expansion (adding additional grade bands)
 □ Horizontal Expansion (adding additional classrooms to existing grade bands)
 □ Replication (creating a new charter school under a new charter contract)
- 3. Target Area(s) for Future Growth

Describe the geographic areas or communities that you are targeting for future growth. This description should detail the demographics of the target community, specific community needs and resources, and the need in the area for a high-quality charter school. Please also describe why you selected this area to target for your future growth. Applicants are not required to have a specific area identified at this time but should give an explanation of the region/communities being considered and/or the characteristics and demographics of the ideal community for replication or expansion. Please note that this program will accept applicants interested in growing in the SCSC's geographic priority areas.

4. Introduction

Tell us about your school/organization and your plans for expansion or a new school. Describe your school's purpose and core vision, instructional model, leadership structure, the need in the community it serves, and community demand for the school(s) (including number of students served and waitlist by grade).

5. Vision

What is your vision for your school/organization in 5 and then 10 years from now? Why expand or replicate, and why now? What discussions have you had about this, and with which stakeholders (i.e. board, leadership team, community)? Please describe how this replication or expansion will impact the organization's overall vision.

6. Timing

Describe when you plan to replicate or expand. Please provide any relevant details that you think may be helpful for the evaluation team.

7. Statement of Interest

How will this experience and related grants help bring your vision into existence? Please include 2-3 current or anticipated challenges and how you would work through them in this cohort to realize the vision you have described.

8. Availability for Convenings

Please indicate any dates between September 1 and December 12, 2022 when the key leaders of this work from your organization would **not** be able to participate in a half/full day convening. We will confirm convening dates after the cohort has been selected, and participation in convenings will be mandatory. Dates for Phase II convenings will be determined this fall, and participants will be required to attend these sessions.

Georgia Strategic Charter School Growth Initiative

Replication and Expansion Cohort Program

Lead Participant Commitment

Please sign this form and include it as an attachment to your application. By signing this form, you are indicating:

- The school/organization will cover the cost of team members' travel and lodging for two day-long site visits (location TBD).
- The school/organization is actively considering expanding or replicating your school to impact and reach more students. You have begun to create a general plan for growth that you'd like to pursue and would like strategic support in answering key questions about how to grow and evolve your organization accordingly.
- You have a chief-level leader who, from September 2022 September 2023, is prepared to commit;
 - roughly 15-20 hours per month to the Charter Growth Initiative cohort program
 - Leading internal 1:1 and team conversations about growth-related topics
 - Completing structured pre-work documents to prepare for advisory calls
 - Participating in weekly or bi-weekly advisory calls with Bellwether
 - Attending 2 in-person convenings (these weeks will require significantly more time)
 - Capturing strategic growth approach in a codified document (usually PPT)
 - Overseeing the development of a financial model
- You have a chief-level leader who will participate in the GCSA Replication/Expansion Incubator Program as a part of Phase II of the cohort.
- The school/organization will engage stakeholders actively in this process as needed for your organization, including at least one board member.
- The school/organization is ready to develop a strategic plan and financial model focused on growth over the coming 2-5 years in partnership with technical assistance providers.
- The existing school has developed a sound model and effective academic and operational foundation, and the school/organization recognizes that this cohort program will not focus on the improvement of the existing school's instruction or operations.
- The school/organization will actively collaborate and contribute to the cohort and all of its members as part of a community of practice.

School	
Lead Participant Signature	Lead Participant Name
Lead Participant Title	
Lead Participant Email Address	Lead Participant Phone Number

Georgia Strategic Charter School Growth Initiative Replication and Expansion Cohort Application p. 6

Georgia Strategic Charter School Growth Initiative

Replication and Expansion Cohort Program

Board Chair Acknowledgment

The school/organization's governing board chair must sign this form and return it as an attachment to your application.

Our organization is applying to participate in the **Georgia Strategic Charter School Growth Initiative Replication and Expansion Cohort Program**, which begins August 2022 and concludes September 2023. This selective experience is intended to help charter organizations across Georgia grow their capacity to increase charter school opportunities for Georgia students through the replication or expansion of existing high-quality charter schools.

Participating leaders will be expected to spend approximately 15-20 hours per month through December 2022, followed by participating in the GCSA Replication and Expansion Program beginning in January 2023, and will ultimately develop a practical and comprehensive strategic plan with a near-term path to growth and a flexible financial model to be used for decision-making around growth. Throughout the experience, the leader will also be expected to include appropriate members of their leadership teams in critical decisions.

By signing this form, I am indicating:

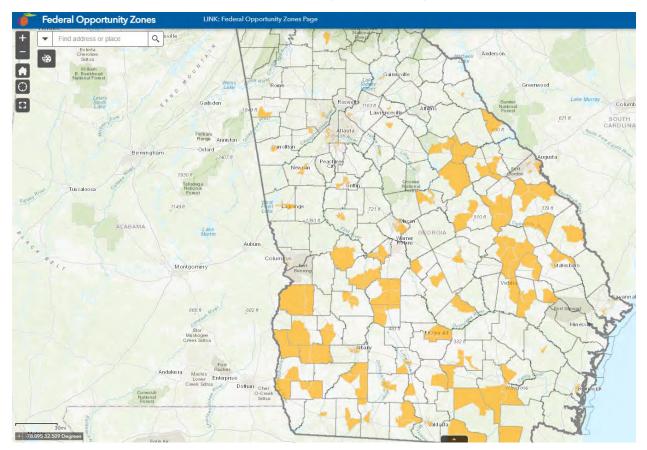
- I endorse our organization's growth exploration and the investment of resources in the Charter Growth Initiative as an organizational priority.
- I understand the time commitment required and will support leadership's investment in this initiative while also performing the important day-to-day responsibilities of her/his job.
- I am willing to participate in a launch interview and serve as a point person for leadership through this process, OR I have identified another board member who will serve in this role. Name, phone number, and email address of designated board member:

School	
Board Chair Signature	Board Chair Name
Board Chair Email Address	Board Chair Phone Number

Target Communities for the Georgia Strategic Charter Growth Initiative

Communities in Georgia that meet one or more of the following criteria:

- Low-income community as designated by Census
- Communities with no charter school within 10 miles
- Rural communities
- Communities located outside of Greater Atlanta
- Located in an Opportunity Zone (map below)



https://georgia-dca.maps.arcgis.com/apps/webappviewer/index.html?id=3e0a3b024d844437bd88d8069d7182a3

TITLE 20. EDUCATION CHAPTER 2. ELEMENTARY AND SECONDARY EDUCATION ARTICLE 31. CHARTER SCHOOLS ACT OF 1998

§ 20-2-2060. Short title

This article shall be known and may be cited as the "Charter Schools Act of 1998."

HISTORY: Code 1981, § 20-2-2060, enacted by Ga. L. 1998, p. 1080, § 3.

§ 20-2-2061. Legislative intent

It is the intent of the General Assembly to increase student achievement through academic and organizational innovation by encouraging local school systems to utilize the flexibility of a performance based contract called a charter.

HISTORY: Code 1981, § 20-2-2061, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2002, p. 388, § 1; Ga. L. 2004, p. 107, § 19; Ga. L. 2005, p. 798, § 6/SB 35.

§ 20-2-2062. Definitions

As used in this article, the term:

(1) "Charter" means a performance based contract between a local board and a charter petitioner, the terms of which are approved by the local board and by the state board in the case of a local charter school, between the state board and a charter petitioner, the terms of which are approved by the state board in the case of a state chartered special school, or between a local board and the state board, the terms of which are approved by the state board in the case of a charter and the state board in the case of a charter system. By entering into a charter, a charter petitioner and local board shall be deemed to have agreed to be bound to all the provisions of this article as if such terms were set forth in the charter.

(1.1) "Charter attendance zone" means all or any portion of the local school system in which the charter school is located and may include all or any portion of other local school systems if the charter school is jointly authorized pursuant to subsection (c) of Code Section 20-2-2063.

(2) "Charter petitioner" means a local school, local board of education, private individual, private organization, or state or local public entity that submits a petition for a charter. The term "charter petitioner" does not include home study programs or schools, sectarian schools, religious schools, private for profit schools, private educational institutions not established, operated, or governed by the State of Georgia, or existing private schools.

(3) "Charter school" means a public school that is operating under the terms of a charter.

(3.1) "Charter system" means a local school system that is operating under the terms of a charter pursuant to Code Section 20-2-2063.1.

(4) "Conversion charter school" means a charter school that existed as a local school prior to becoming a charter school.

(5) "Faculty and instructional staff members" means all certificated personnel assigned to the 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 Code Section 20-2-204.

(5.1) "Governing council" means a school level council of parents, teachers, administrators, and others who are involved in school level governance within a charter system.

(5.2) "High school cluster" means a high school and all of the middle and elementary schools which contain students who matriculate to such high school. The schools in a high school cluster may include charter schools, local schools, or a combination of both.

(6) "Local board" means a county or independent board of education exercising control and management of a local school system pursuant to Article VIII, Section V, Paragraph II of the Constitution.

(7) "Local charter school" means a conversion charter school or start-up charter school that is operating under the terms of a charter between the charter petitioner and the local board.

(8) "Local revenue" means local taxes budgeted for school purposes in excess of the local five mill share, combined with any applicable equalization grant and budgeted revenues from any of the following: investment earnings, unrestricted donations, and the sale of surplus property; but exclusive of revenue from bonds issued for capital projects, revenue to pay debt service on such bonds and local option sales tax for capital projects. Nothing in this paragraph shall be construed to prevent a local board from including a local charter school in projects specified in the ballot language of a local option sales tax or bond referendum.

(9) "Local school" means a public school in Georgia that is under the management and control of a local board.

(10) "Local school system" means the system of public schools established and maintained by a local board within its limits pursuant to Article VIII, Section V, Paragraph I of the Constitution.

(11) "Petition" means a proposal to establish a charter school or a charter system.

(12) "QBE formula earnings" means funds earned for the Quality Basic Education Formula pursuant to Code Section 20-2-161, including the portion of such funds that are calculated as the local five mill share in accordance with Code Section 20-2-164.

(12.1) "School level governance" means decision-making authority in personnel decisions, financial decisions, curriculum and instruction, resource allocation, establishing and monitoring the achievement of school improvement goals, and school operations.

(13) "Special school" means a school whose creation is authorized pursuant to Article VIII, Section V, Paragraph VII of the Constitution.

(14) "Start-up charter school" means a charter school that did not exist as a local school prior to becoming a charter school.

(15) "State board" means the State Board of Education.

(16) "State chartered special school" means a charter school created as a special school that is operating under the terms of a charter between the charter petitioner and the state board.

(17) "System charter school" means a school within a charter system.

HISTORY: Code 1981, § 20-2-2062, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2001, p. 148, § 22; Ga. L. 2002, p. 388, § 1; Ga. L. 2005, p. 798, §§ 7, 8/SB 35; Ga. L. 2007, p. 185, § 3/SB 39.

§ 20-2-2063. Charter petitions

(a) The State Board of Education shall promulgate rules, regulations, policies, and procedures to govern the contents of a charter petition.

(b) The State Board of Education shall establish rules, regulations, policies, and procedures to provide for the receipt of charter petitions from a group of two or more local schools as a single charter petitioner to convert to conversion charter school status. An existing conversion charter school may join as part of a group charter petition, and if such group charter petition is approved, the new charter shall supersede the conversion charter school's previous charter. A group charter petition may be comprised of all the schools in a high school cluster as such term is defined in Code Section 20-2-2062.

(c) The State Board of Education shall establish rules, regulations, policies, and procedures to provide for charter petitions from two or more local school systems to

jointly authorize a local charter school.

(d) The State Board of Education shall establish rules, regulations, policies, and procedures to provide for a charter petition from a local school system to establish a charter system. Such rules, regulations, policies, and procedures shall require that a charter petition and the charter contain an explanation of the structure, rights, and responsibilities of the principal, governing council, and local board of education of the system charter school, with an objective of maximizing school level governance and the involvement of parents, teachers, and community members in such governance.

HISTORY: Code 1981, § 20-2-2063, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2002, p. 388, § 1; Ga. L. 2005, p. 798, § 9/SB 35; Ga. L. 2007, p. 185, § 4/SB 39.

§ 20-2-2063.1. Charter Advisory Committee established; members; duties

(a) The state board shall establish a Charter Advisory Committee to review charter petitions for compliance with established standards of the state board, to make recommendations to the state board on charter policy, and to provide recommendations to the state board regarding charter petitions. The committee shall be composed of nine members as follows:

(1) Three members appointed by the chairperson of the state board;

- (2) Three members appointed by the Lieutenant Governor; and
- (3) Three members appointed by the Speaker of the House of Representatives.

All members shall serve at the pleasure of their respective appointing officials. The committee shall elect a chairperson from among its membership.

(b) The committee shall conduct itself in accordance with any rules and guidelines established by the state board with regard to timeframes, procedures, and protocol.

(c) The committee shall be authorized to request clarifying information from a charter petitioner and to receive input from interested parties on a charter petition.

(d) The committee shall:

(1) Make recommendations to the state board of approval or denial on each charter petition and shall specify the reasons for such recommendations;

(2) Periodically make recommendations to the state board regarding charter policy; and

(3) Make recommendations to the state board on the disbursement of planning grants for charter systems, if funds are made available.

(e) The committee shall be authorized to enter into contracts, subject to available funding, with one or more consultants to assist the committee in its duties and if directed to do so by the committee, to do the following:

(1) Assist charter petitioners in the drafting of their petitions;

(2) Assist charter petitioners in the design and implementation of innovative education programs and school level governance based on research, model programs, or other credible information;

(3) Monitor and assist charter schools and charter systems; and

(4) Perform any other functions related to the support of the committee.

(f) The committee shall work in cooperation with the Office of Charter School Compliance, as established pursuant to Code Section 20-2-2069.

(g) The members of the committee shall receive no compensation for their services but shall be reimbursed for actual and necessary expenses incurred by them in carrying out their duties.

(h) The committee shall be assigned to the Department of Education for administrative purposes only, as prescribed in Code Section 50-4-3.

HISTORY: Code 1981, § 20-2-2063.1, enacted by Ga. L. 2007, p. 185, § 5/SB 39.

§ 20-2-2063.2. Charter systems

(a) The state board shall be authorized to enter into a charter with a local board to establish a local school system as a charter system.

(b) A local board seeking to create a charter system must submit a petition to the state board. Prior to submitting such petition, the local board shall:

(1) Adopt a resolution approving the proposed charter system petition;

(2) Conduct at least two public hearings and provide notice of the hearings in the same manner as other legal notices of the local board; and

(3) Send a notice to each principal within the local school system of the hearings with instructions that each school shall distribute the notice to faculty and instructional staff members and to the parent or guardian of each student enrolled in the school.

The local board may revise its proposed charter system petition, upon resolution, as a

result of testimony at the public hearings or for other purposes.

(c) Prior to approval or denial of a charter petition for a charter system, the state board shall receive and give all due consideration to the recommendation and input from the Charter Advisory Committee established in Code Section 20-2-2063.1. The state board shall approve the charter if the state board finds, after receiving input from the Charter Advisory Committee, that the petition complies with the rules, regulations, policies, and procedures promulgated pursuant to Code Section 20-2-2063 and the provisions of this title, is in the public interest, and promotes school level governance.

(d) All schools within an approved charter system shall be system charter schools except as otherwise provided in subsections (f) and (g) of this Code section.

(e) (1) Subject to appropriations by the General Assembly or other available funding, the state board, after receiving input and recommendations from the Charter Advisory Committee, shall disburse planning grants to local school systems which desire to become charter systems. Such grants will be disbursed in accordance with any applicable guidelines, policies, and requirements established by the state board.

(2) Subject to specific appropriations by the General Assembly for this purpose, the state board shall disburse implementation grants in the amount of \$125,000.00 or such other amount as determined by the state board to each charter system. The state board shall be authorized to approve up to five petitions for charter systems during fiscal year 2008, and may approve up to a maximum number of petitions in following years as may be established pursuant to board rules and as subject to availability of funding for implementation grants.

(f) A system charter school shall not be precluded from petitioning to become a conversion charter school, in accordance with Code Section 20-2-2064, not subject to the terms of the system charter. In the event a system charter school becomes a conversion charter school, the system charter shall be amended to reflect that such school is no longer bound by the system charter.

(g) An existing conversion or start-up charter school within a local school system which is petitioning to become a charter system shall have the option of continuing under its own existing charter, not subject to the terms of the system charter, or of terminating its existing charter, upon agreement by the local board and state board, and becoming subject to the system charter as a charter system school.

HISTORY: Code 1981, § 20-2-2063.2, enacted by Ga. L. 2007, p. 185, § 5/SB 39.

§ 20-2-2064. Approval or denial of petition

(a) A charter petitioner seeking to create a conversion charter school must submit a petition to the local board of the local school system in which the proposed charter school

will be located. The local board must by a majority vote approve or deny a petition no later than 60 days after its submission unless the petitioner requests an extension; provided, however, that a denial of a petition by a local board shall not preclude the submission to the local board of a revised petition that addresses deficiencies cited in the denial; and provided, further, that the local board shall not act upon a petition for a conversion charter school until such petition:

(1) Has been freely agreed to, by secret ballot, by a majority of the faculty and instructional staff members of the petitioning local school at a public meeting called with two weeks' advance notice for the purpose of deciding whether to submit the petition to the local board for its approval; and

(2) Has been freely agreed to, by secret ballot, by a majority of parents or guardians of students enrolled in the petitioning local school present at a public meeting called with two weeks' advance notice for the purpose of deciding whether to submit the petition to the local board for its approval.

This subsection shall not apply to a system charter school petitioning to be a conversion charter school.

(b) A charter petitioner seeking to create a start-up charter school must submit a petition to the local board of the local school system in which the proposed charter school will be located. The local board must by a majority vote approve or deny a petition no later than 60 days after its submission unless the petitioner requests an extension. A denial of a petition by a local board shall not preclude the submission to the local board of a revised petition that addresses deficiencies cited in the denial.

(c) A system charter school's school council or governing council, as applicable, may petition to become a conversion charter school. The petition shall be submitted to the local board of the charter system in which the school is located. The local board must by a majority vote approve or deny a petition no later than 60 days after its submission unless the petitioner requests an extension; provided, however, that a denial of a petition by a local board shall not preclude the submission to the local board of a revised petition that addresses deficiencies cited in the denial.

(d) A local board shall approve a petition that complies with the rules, regulations, policies, and procedures promulgated in accordance with Code Section 20-2-2063 and the provisions of this title and is in the public interest. If a local board denies a petition, it must within 60 days specifically state the reasons for the denial, list all deficiencies with respect to Code Section 20-2-2063, and provide a written statement of the denial to the charter petitioner and the state board.

(e) The state board or the Charter Advisory Committee, if directed by the state board to do so, may mediate between the local board and a charter petitioner whose petition was denied to assist in resolving issues which led to denial of the petition by the local board.

HISTORY: Code 1981, § 20-2-2064, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2000, p. 618, § 74; Ga. L. 2002, p. 388, § 1; Ga. L. 2004, p. 107, § 19B; Ga. L. 2007, p. 185, § 6/SB 39.

§ 20-2-2064.1. Review of charter by state board; charters for state chartered special schools

(a) Prior to approval or denial of a charter petition under this Code section, the state board shall receive and give all due consideration to the recommendation and input from the Charter Advisory Committee established in Code Section 20-2-2063.1.

(b) The state board shall approve the charter of a charter petitioner if the petition has been approved by the local board of the local school system in which the proposed charter school will be located and the state board finds, after receiving input from the Charter Advisory Committee, that the petition complies with the rules, regulations, policies, and procedures promulgated in accordance with Code Section 20-2-2063 and the provisions of this title and is in the public interest. If the state board denies a petition, it must within 60 days specifically state the reasons for the denial, list all deficiencies with regard to Code Section 20-2-2063, and provide a written statement of the denial to the charter petitioner and to the local board.

(c) No application for a state chartered special school may be made to the state board by a petitioner for a conversion charter school that has been denied by a local board. Upon denial of a petition for a start-up charter school by a local board and upon application to the state board by the petitioner, the state board shall approve the charter of a start-up charter petitioner for a state chartered special school if the state board finds, after receiving input from the Charter Advisory Committee, that such petition meets the requirements set forth in Code Section 20-2-2063 and the provisions of this title, and is in the public interest.

HISTORY: Code 1981, § 20-2-2064.1, enacted by Ga. L. 2002, p. 388, § 1; Ga. L. 2005, p. 798, § 11/SB 35; Ga. L. 2007, p. 185, § 7/SB 39.

OPINIONS OF THE ATTORNEY GENERAL

A STATE CHARTER GRANTED UNDER SUBSECTION (D)(1) (NOW SUBSECTION (B)) OF O.C.G.A. § 20-2-2064.1 must meet the same requirements and definitions as other charter schools in the Charter Schools Act, O.C.G.A. § 20-2-2-6- et seq. 2001 Op. Att'y Gen. No. 2001-9.

§ 20-2-2065. Waiver of provisions of this title; requirements for operating; control and management

(a) Except as provided in this article or in a charter, a charter school, or for charter systems, each school within the system, shall not be subject to the provisions of this title or any state or local rule, regulation, policy, or procedure relating to schools within an applicable school system regardless of whether such rule, regulation, policy, or procedure is established by the local board, the state board, or the Department of Education; provided, however, that the state board may establish rules, regulations, policies, or procedures consistent with this article relating to charter schools. A waiver granted pursuant to this Code section for a charter system shall apply to each system charter school within the system. In exchange for such a waiver, the charter school agrees to meet or exceed the performance based goals included in the charter and approved by the local board or, for the charter system, the system agrees to meet or exceed the systemwide performance based goals included in the charter and approved by the state board, including but not limited to raising student achievement. For a charter system, the charter shall delineate the performance based goals that the system and each school will be expected to meet as well as the criteria by which a system charter may be revoked in addition to those contained in Code Section 20-2-2068.

(b) In determining whether to approve a charter petition or renew an existing charter, the local board and state board shall ensure that a charter school, or for charter systems, each school within the system, shall be:

(1) A public, nonsectarian, nonreligious, nonprofit school that is not home based, provided that a charter school's nonprofit status shall not prevent the school from contracting for the services of a for profit entity and that nothing in this Code section shall preclude the use of computer and Internet based instruction for students in a virtual or remote setting;

(2) Subject to the control and management of the local board of the local school system in which the charter school is located, as provided in the charter and in a manner consistent with the Constitution, if a local charter school;

(3) Subject to the supervision of the state board, as provided in the charter and in a manner consistent with the Constitution, if a state chartered special school;

(4) Organized and operated as a nonprofit corporation under the laws of this state; provided, however, that this paragraph shall not apply to any charter petitioner that is a local school, local school system, or state or local public entity;

(5) Subject to all federal, state, and local rules, regulations, court orders, and statutes relating to civil rights; insurance; the protection of the physical health and safety of school students, employees, and visitors; conflicting interest transactions; and the prevention of unlawful conduct;

(6) Subject to all laws relating to unlawful conduct in or near a public school;

(7) Subject to an annual financial audit conducted by the state auditor or, if specified in the charter, by an independent certified public accountant licensed in this state;

(8) Subject to the provisions of Part 3 of Article 2 of Chapter 14 of this title, and such provisions shall apply with respect to charter schools whose charters are granted or renewed on or after July 1, 2000;

(9) Subject to all reporting requirements of Code Section 20-2-160, subsection (e) of Code Section 20-2-161, Code Section 20-2-320, and Code Section 20-2-740;

(10) Subject to the requirement that it shall not charge tuition or fees to its students except as may be authorized for local boards by Code Section 20-2-133; and

(11) Subject to the provisions of Code Section 20-2-1050 requiring a brief period of quiet reflection.

HISTORY: Code 1981, § 20-2-2065, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2000, p. 618, § 75; Ga. L. 2002, p. 388, § 1; Ga. L. 2005, p. 798, § 12/SB 35; Ga. L. 2006, p. 488, § 1/SB 610; Ga. L. 2007, p. 185, § 8/SB 39.

OPINIONS OF THE ATTORNEY GENERAL

STATE CHARTER SCHOOLS ARE SUBJECT to the control and management of the local board of education. 2001 Op. Att'y Gen. No. 2001-9.

TEACHERS AT CHARTER SCHOOLS shall be members of the Teachers Retirement System. 1999 Op. Att'y Gen. No. U99-4.

§ 20-2-2066. Admission, enrollment, and withdrawal of students

(a) A local charter school shall enroll students in the following manner:

(1)(A) A start-up charter school shall enroll any student who resides in the charter attendance zone as specified in the charter and who submits a timely application as specified in the charter unless the number of applications exceeds the capacity of a program, class, grade level, or building. In such case, all such applicants shall have an equal chance of being admitted through a random selection process unless otherwise prohibited by law; provided, however, that a start-up charter school may give enrollment preference to applicants in any one or more of the following categories in the order of priority specified in the charter:

(i) A sibling of a student enrolled in the start-up charter school;

(ii) A sibling of a student enrolled in another local school designated in the charter;

(iii) A student whose parent or guardian is a member of the governing board of the charter school or is a full-time teacher, professional, or other employee at the charter school; and

(iv) Students matriculating from a local school designated in the charter;

(B) A conversion charter school shall enroll any student who resides in the attendance zone specified in the charter and who submits a timely application as specified in the charter. If the number of applying students who reside in the attendance zone does not exceed the capacity as specified in the charter, additional students shall be enrolled based on a random selection process; provided, however, that enrollment preferences may be given to applicants in any one or more of the following categories in the order of priority specified in the charter:

(i) A sibling of a student enrolled in the charter school or in any school in the high school cluster;

(ii) Students whose parent or guardian is a member of the governing board of the charter school or is a full-time teacher, professional, or other employee at the charter school;

(iii) Students who were enrolled in the local school prior to its becoming a charter school; and

(iv) Students who reside in the charter attendance zone specified in the charter; and

(2) A student who resides outside the school system in which the local charter school is located may not enroll in that local charter school except pursuant to a contractual agreement between the local boards of the school system in which the student resides and the school system in which the local charter school is located. Unless otherwise provided in such contractual agreement, a local charter school may give enrollment preference to a sibling of a nonresident student currently enrolled in the local charter school.

(b) A state chartered special school shall enroll any student who resides in the attendance zone specified in the charter and who submits a timely application as specified in the charter unless the number of applications exceeds the capacity of a program, class, grade level, or building. The period of time during which an application for enrollment may be submitted shall be specified in the charter. In such case, all such applicants shall have an equal chance of being admitted through a random selection process unless otherwise prohibited by law; provided, however, that a state chartered special school may give enrollment preference to a child of a full-time teacher, professional, or other employee of the state chartered special school as provided for in subsection (b) of Code Section 20-2-293 or to a sibling of a student currently enrolled in the state chartered special school.

(b.1) A charter system shall enroll students in its system charter schools per the terms of the charter and in accordance with state board rules.

(c) A charter school shall not discriminate on any basis that would be illegal if used by a school system.

(d) A student may withdraw without penalty from a charter school at any time and enroll in a local school in the school system in which such student resides as may be provided for by the policies of the local board. A student who is suspended or expelled from a charter school as a result of a disciplinary action taken by a charter school shall be entitled to enroll in a local school within the local school system in which the student resides, if, under the disciplinary policy of the local school system, such student would not have been subject to suspension or expulsion for the conduct which gave rise to the suspension or expulsion. In such instances, the local board shall not be required to independently verify the nature or occurrence of the applicable conduct or any evidence relating thereto.

HISTORY: Code 1981, § 20-2-2066, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2002, p. 388, § 1; Ga. L. 2005, p. 798, § 13/SB 35; Ga. L. 2007, p. 185, § 9/SB 39.

§ 20-2-2067. Reprisals by local boards or school system employees prohibited

A local board of education or a school system employee who has control over personnel actions shall not take unlawful reprisal against another employee of the school system because such other employee is directly or indirectly involved with a petition to establish a charter school. A local board of education or a school system employee shall not take unlawful reprisal against an educational program of any school or school system because a petition to establish a charter school proposes the conversion of such educational program to a charter school. As used in this Code section, the term 'unlawful reprisal' means an action taken by a local board of education or a school system employee as a direct result of a lawful petition to establish a charter school which action is adverse to another employee and which is not lawfully taken in response to any action or behavior of such employee or is adverse to an educational program of the school or the school system and:

(1) With respect to such other employee, results in one or more of the following:

- (A) Disciplinary or corrective action;
- (B) Transfer or reassignment, whether temporary or permanent;
- (C) Suspension, demotion, or dismissal;
- (D) An unfavorable performance evaluation;

(E) A reduction in pay, benefits, or awards;

(F) Elimination of the employee's position without a reduction in force by reason of lack of moneys or work; or

(G) Other significant changes in duties or responsibilities that are inconsistent with the employee's salary or employment classification; or

(2) With respect to an educational program, results in one or more of the following:

(A) Suspension or termination of the educational program;

(B) Transfer or reassignment of the educational program to a less favorable department;

(C) Relocation of the educational program to a less favorable site within the school or school system; or

(D) Significant reduction or termination of funding for the educational program, unless necessitated by unfunded mandates from federal or state decisions which result in a significant reduction in funds available to the local board of education and which result in a proportionate loss of funding for all schools in the system.

HISTORY: Code 1981, § 20-2-2067, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 1999, p. 81, § 20; Ga. L. 2002, p. 388, § 1.

§ 20-2-2067.1. Amendment of terms of charter for charter school; initial term of charter; annual report

(a) The terms of a charter for a local charter school may be amended during the term of the charter upon the approval of the local board, the state board, and the charter school. The terms of a charter for a state chartered special school may be amended during the term of the charter upon the approval of the state board and the charter school. The terms of a charter for a charter system may be amended during the term of the charter upon approval of the state board.

(b) The initial term of a charter, except for a charter system, shall be for a minimum of five years, unless the petitioner shall request a shorter period of time, and shall not exceed ten years. The local board and the state board, in accordance with Code Section 20-2-2064.1, may renew a local charter, upon the request of the charter school, for the period of time specified in the request, not to exceed ten years. The state board may renew a state chartered special school, upon the request of the school, for the period of time specified in the request, not to exceed ten years. The initial term of a charter for a charter system shall not exceed five years. The state board may renew the charter of a

charter system, upon the request of the local board, for the period of time specified in the request, not to exceed ten years.

(c) Each start-up and conversion charter school and each charter system shall submit an annual report outlining the previous year's progress to the authorizing local board or state board, as appropriate; to parents and guardians of students enrolled in the school, or, for a charter system, to parents and guardians of students enrolled in school within the local school system; and to the Department of Education no later than October 1 of each year. The report submitted by a charter system shall include, but not limited to, data on all of its system charter schools. The report shall contain, but is not limited to:

(1) An indication of progress toward the goals as included in the charter;

(2) Academic data for the previous year, including state academic accountability data, such as standardized test scores and adequate yearly progress data;

(3) Unaudited financial statements for the fiscal year ending on June 30, provided that audited statements will be forwarded to the local board and state board upon completion;

(4) Updated contact information for the school and the administrator, and for charter systems, each system charter school and its respective administrator;

(5) Proof of current nonprofit status, if applicable;

(6) Any other supplemental information that the charter school or charter system chooses to include or that the state board requests that demonstrates that school or system's success; and

(7) For charter systems, an on-site external evaluation of the system at least once every five years, as determined by the state board.

HISTORY: Code 1981, § 20-2-2067.1, enacted by Ga. L. 2002, p. 388, § 1; Ga. L. 2005, p. 798, § 14/SB 35; Ga. L. 2007, p. 185, § 10/SB 39.

§ 20-2-2068. Termination of a charter

(a) The state board may terminate a charter under the following circumstances:

(1) (A) If a majority of the parents or guardians of students enrolled at the charter school vote by a majority vote to request the termination of its charter at a public meeting called with two weeks' advance notice and for the purpose of deciding whether to request the state board to declare the charter null and void; or

(B) If a majority of the faculty and instructional staff employed at the charter school vote by a majority vote to request the termination of its charter at a public meeting called

with two weeks' advance notice and for the purpose of deciding whether to request the state board to declare the charter null and void.

This paragraph shall not apply to system charter schools;

(2) If, after providing reasonable notice to the charter school or charter system, as applicable, and an opportunity for a hearing, the state board finds:

(A) A failure to comply with any recommendation or direction of the state board with respect to Code Section 20-14-41;

(B) A failure to adhere to any material term of the charter, including but not limited to the performance goals set forth in the charter;

(C) A failure to meet generally accepted standards of fiscal management;

(D) A violation of applicable federal, state, or local laws or court orders;

(E) The existence of competent substantial evidence that the continued operation of the charter school or charter system would be contrary to the best interests of the students or the community; or

(F) A failure to comply with any provision of Code Section 20-2-2065; or

(3) Upon the written request of a local board for termination of a charter for a local charter school located within its school system if, prior to making such request, the local board provided reasonable notice to the charter school and an opportunity for a hearing, and determined the existence of any of the grounds described in paragraph (2) of this Code section.

(b) For a system charter school, if the school council or governing council, as applicable, at such school within the charter system requests that:

(1) The system charter be terminated; or

(2) The system charter be amended with respect to such system charter school,

the state board, after providing reasonable notice to the charter system and the system charter school, shall conduct a hearing. Based on the findings of the hearing, the state board may enter into negotiations with the charter system to amend the charter to address the concerns of the requesting system charter school. If negotiations fail and the state board finds good cause, the state board shall be authorized to terminate the system charter or to amend the system charter with respect to the requesting system charter school; provided, however, that the local board shall be authorized to terminate the system charter if it is unwilling to accept the amendments to such charter by the state board. The term "good cause" includes but is not limited to a local board's failure to comply with its obligations and duties under the system charter, state board rules, or other applicable law, or other good cause as determined in the sole discretion of the state board.

HISTORY: Code 1981, § 20-2-2068, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 1999, p. 81, § 20; Ga. L. 2002, p. 388, § 1; Ga. L. 2007, p. 185, § 11/SB 39; Ga. L. 2008, p. 324, § 20/SB 455.

OPINIONS OF THE ATTORNEY GENERAL

STATE CHARTER SCHOOLS COULD QUALIFY FOR STATE GRANTS pursuant to subsection (d) of former O.C.G.A. § 20-2-2068, and a local system was required to treat a state charter school no less favorably than other local schools located within the applicable school system. 2001 Op. Att'y Gen. No. 2001-9.

§ 20-2-2068.1. Quality basic education formula applies; grants, local tax revenue, and funds from local bonds

(a) A local charter school shall be included in the allotment of QBE formula earnings, applicable QBE grants, applicable non-QBE state grants, and applicable federal grants to the local school system in which the local charter school is located under Article 6 of this chapter. The local board and the state board shall treat a conversion charter school no less favorably than other local schools located within the applicable local school system unless otherwise provided by law. The local board and the state board shall treat a start-up charter school no less favorably than other local schools within the applicable local system with respect to the provision of funds for instruction, school administration, transportation, food services, and, where feasible, building programs.

(b) QBE formula earnings, applicable QBE grants, applicable non-QBE state grants, and applicable federal grants earned by a local charter school shall be distributed to the local charter school by the local board; provided, however, that state equalization grant earnings shall be distributed as provided in subsection (c) of this Code section. QBE formula earnings shall include the salary portion of direct instructional costs, the adjustment for training and experience, the nonsalary portion of direct instructional costs, and earnings for psychologists and school social workers, school administration, facility maintenance and operation, media centers, additional days of instruction in accordance with Code Section 20-2-184.1, and staff development. The local charter school shall report enrolled students in a manner consistent with Code Section 20-2-160.

(c) In addition to the earnings set out in subsection (b) of this Code section, local revenue shall be allocated to a local charter school on the same basis as for any local school in the local school system. In the case of a start-up charter school, local revenue earnings shall be calculated as follows:

(1) Determine the total amount of state and local five mill share funds earned by students enrolled in the local start-up charter school as calculated by the Quality Basic

Education Formula pursuant to Part 4 of Article 6 of this chapter including any funds for psychologists and school social workers but excluding 5 percent of system-wide funds for central administration and excluding any categorical grants not applicable to the charter school;

(2) Determine the total amount of state and local five mill share funds earned by all students in the public schools of the local school system, including any charter schools that receive local revenue, as calculated by the Quality Basic Education Formula but excluding categorical grants and other non-QBE formula grants;

(3) Divide the amount obtained in paragraph (1) of this subsection by the amount obtained in paragraph (2) of this subsection; and

(4) Multiply the quotient obtained in paragraph (3) of this subsection by the school system's local revenue. The product obtained in paragraph (4) of this subsection shall be the amount of local funds to be distributed to the local start-up charter school by the local board; provided, however, that nothing in this subsection shall preclude a charter petitioner and a local board of education from specifying in the charter a greater amount of local funds to be provided by the local board to the local start-up charter school if agreed upon by all parties to the charter. Local funds so earned shall be distributed to the local start-up charter school by the local board. Where feasible and where services are provided, funds for construction projects shall also be distributed to the local start-up charter school as earned. In all other fiscal matters, including applicable federal allotments, the local board shall treat the local start-up charter school no less favorably than other local schools located within the applicable school system and shall calculate and distribute the funding for the start-up charter school on the basis of its actual or projected enrollment in the current school year according to an enrollment counting procedure or projection method stipulated in the terms of the charter.

(c.1) The adjustments in each program for training and experience used in calculating the start-up charter school's QBE formula earnings shall be calculated in the same manner as for any local school within the local school system; provided, however, that the adjustments in each program for training and experience used in calculating the start-up charter school's QBE formula earnings shall not be less than one-half of the comparable percentages for the local school system in which the charter school is located.

(c.2) For newly approved local charter schools, including charter renewals, the local board of education may retain an amount of the charter school's per pupil share of state and local funding not to exceed 3 percent of the total funds earned by the charter school to reimburse the local school system for administrative services actually provided to the charter school.

(d) QBE formula earnings, applicable QBE grants, applicable non-QBE state grants, and applicable federal grants that are earned by a state chartered special school shall be distributed to the local board of the local school system in which the state chartered special school is located which shall distribute the same amount to the state chartered

special school; provided, however, that a state chartered special school shall not be included in the calculation and distribution of the local school system's equalization grant unless the voters of the local school system have approved the use of revenue from local tax levies and funds from local bonded indebtedness to support the state chartered special school in accordance with subsection (e) of this Code section. If such approval has been given, state equalization grant earnings shall be earned for the state chartered special school and shall be distributed as provided in subsection (f) of this Code section. The local board shall not be responsible for the fiscal management, accounting, or oversight of the state chartered special school. The state chartered special school shall report enrolled students in a manner consistent with Code Section 20-2-160. Any data required to be reported by the state chartered special school shall be submitted directly by the school to the appropriate state agency. Where feasible, the state board shall treat a state chartered special school no less favorably than other public schools within the state with respect to the provision of funds for transportation and building programs.

(e) The state board may require a local referendum of the qualified voters in the local school system in which the state chartered special school will be located. Such referendum shall be held at the next regularly scheduled general election or as may otherwise be authorized at an earlier date by the local board or boards of education affected. Such referendum shall be held for the purpose of deciding whether the local board of education shall provide funds from school tax levies to support such state chartered special school or incur bonded indebtedness to support such state chartered special school or both. The ballot question shall be approved by the state board.

(f) The local board shall treat a state chartered special school for which the use of funds from local bonded indebtedness and local school tax levies has been approved by qualified voters in the system in accordance with subsection (e) of this Code section no less favorably than other public schools located within the applicable school system.

(g) The local board shall not distribute funds from local bond indebtedness and local school tax levies to a state chartered special school unless such use has been approved by qualified voters in accordance with subsection (e) of this Code section.

(h) For system charter schools, funds including federal, state, and local revenue shall be distributed to each such school by the charter system in a manner and in such amounts as are provided in the terms of the charter with an objective of maximizing spending at the school level.

HISTORY: Code 1981, § 20-2-2068.1, enacted by Ga. L. 2002, p. 388, § 1; Ga. L. 2005, p. 798, § 15/SB 35; Ga. L. 2007, p. 185, §§ 12, 13/SB 39; Ga. L. 2008, p. 603, § 2/HB 881; Ga. L. 2009, p. 8, § 20/SB 46.

OPINIONS OF THE ATTORNEY GENERAL

State charter schools can qualify for state grants and a local system is required to treat a state charter school no less favorably than other local schools located within the applicable school system. 2001 Op. Att'y Gen. No. 2001-9.

§ 20-2-2068.2. Facilities fund for charter schools; purposes for which funds may be used; upkeep of charter school property; availability of unused facilities

(a) From moneys specifically appropriated for such purpose, the state board shall create a facilities fund for local charter schools, state chartered special schools, and commission charter schools as defined in Code Section 20-2-2081 for the purpose of establishing a per pupil, need based facilities aid program.

(b) A charter school or commission charter school may receive moneys from the facilities fund if the charter school or commission charter school has received final approval from the Georgia Charter Schools Commission or from the state board for operation during that fiscal year.

(c) A charter school's or commission charter school's governing body may use moneys from the facilities fund for the following purposes:

(1) Purchase of real property;

(2) Construction of school facilities, including initial and additional equipment and furnishings;

(3) Purchase, lease-purchase, or lease of permanent or relocatable school facilities;

(4) Purchase of vehicles to transport students to and from the charter school or commission charter school; and

(5) Renovation, repair, and maintenance of school facilities that the school owns or is purchasing through a lease-purchase or long-term lease of five years or longer.

(d) The Department of Education shall specify procedures for submitting and approving requests for funding under this Code section and for documenting expenditures.

(e) Local boards are required to renovate, repair, and maintain the school facilities of charter schools in the district to the same extent as other public schools in the district if the local board owns the charter school facility, unless otherwise agreed upon by the petitioner and the local board in the charter.

(f) (1) Prior to releasing moneys from the facilities fund, the Department of Education shall ensure that the governing board of the local charter school and the local board shall $\frac{1}{2}$

enter into a written agreement that includes a provision for the reversion of any unencumbered funds and all equipment and property purchased with public education funds to the ownership of the local board in the event the local charter school terminates operations.

(2) Prior to releasing moneys from the facilities fund, the Department of Education shall ensure that the governing board of the state chartered special school and the state board shall enter into a written agreement that includes a provision for the reversion of any unencumbered funds and all equipment and property purchased with public education funds to the ownership of the state board in the event the state chartered special school terminates operations.

(3) Prior to releasing moneys from the facilities fund, the Department of Education shall ensure that the governing board of the commission charter school and the Georgia Charter Schools Commission shall enter into a written agreement that includes a provision for the reversion of any unencumbered funds and all equipment and property purchased with public education funds to the ownership of the Georgia Charter Schools Commission in the event the commission charter school terminates operations.

(g) The reversion of property in accordance with subsection (f) of this Code section is subject to the complete satisfaction of all lawful liens or encumbrances.

(h) Each local board of education shall make its unused facilities available to local charter schools. The terms of the use of such a facility by the charter school shall be subject to negotiation between the board and the local charter school and shall be memorialized as a separate agreement. A local charter school that is allowed to use such a facility under such an agreement shall not sell or dispose of any interest in such property without the written permission of the local board. A local charter school may not be charged a rental or leasing fee for the existing facility or for property normally used by the public school which became the local charter school. A local charter school that receives property from a local board may not sell or dispose of such property without the written permission of the local charter school. A local charter school that receives property from a local board may not sell or dispose of such property without the written permission of the local charter school.

HISTORY: Code 1981, § 20-2-2068.2, enacted by Ga. L. 2004, p. 107, § 19C; Ga. L. 2005, p. 798, § 16/SB 35; Ga. L. 2009, p. 727, § 1/HB 555.

§ 20-2-2069. Office of Charter School Compliance

There is established within the Department of Education an Office of Charter School Compliance, the responsibilities of which shall be to:

(1) Prepare charter school and charter system guidelines to be approved by the state board;

(2) Distribute charter school and charter system petition information to inquiring parties;

(3) Process all charter school and charter system petitions and coordinate with the Charter Advisory Committee established pursuant to Code Section 20-2-2063.1 to facilitate its review and recommendations to the state board;

(4) Administer any state or federal charter school implementation grant program;

(5) Contract with an independent party to evaluate the performance of charter schools and charter systems, as such performance relates to fulfilling the terms of their charters; and

(6) Compile information necessary to produce the annual report required by Code Section 20-2-2070.

HISTORY: Code 1981, § 20-2-2069, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2007, p. 185, § 14/SB 39.

§ 20-2-2070. Annual report to General Assembly

The state board shall report to the General Assembly no later than December 31 of each year on the status of the charter school program.

HISTORY: Code 1981, § 20-2-2070, enacted by Ga. L. 1998, p. 1080, § 3; Ga. L. 2005, p. 798, § 17/SB 35.

§ 20-2-2071. Validity of charters in effect on July 1, 1998

Any charter which was granted pursuant to Code Section 20-2-255 and is in effect on July 1, 1998, shall continue to be valid until such charter expires according to its terms.

HISTORY: Code 1981, § 20-2-2071, enacted by Ga. L. 1998, p. 1080, § 3.



Richard Woods, Georgia's School Superintendent "Educating Georgia's Future"

To: Charter School Leaders
From: GaDOE District Flexibility and Charter Schools Division
Date: June 5, 2019
Re: Locally-Approved Charter School Closure Protocol

Within thirty (30) days of a locally-approved charter school ceasing operations for any reason, the charter school and its governing board will be responsible for concluding the school's business and affairs, and must cooperate with the local Board of Education (LBOE) and the State Board of Education (SBOE) to the extent necessary to provide an orderly return of students to their local school(s) and to redistribute any property purchased with public funds and assets.

Upon LBOE and SBOE approval of the closure, the charter school must complete the following list of deliverables in cooperation with the local school district and Georgia Department of Education District Flexibility and Charter School Division (GaDOE) (as needed) by the established deadlines.

Deliverable 1: School Closure Transition Team

- 1. Identify school closure transition team members and assign roles and responsibilities by the deadline set by the district.
 - Team members must include: Governing Board Chair, Principal/School Leader, CFO/Financial Representative, Legal Representative, Board Trustee.
 - These individuals will be responsible for gathering and disseminating the information outlined further in this closure protocol.
 - The Board Trustee will be responsible for the final repository of school business and personnel records for a minimum of 5 years.
 - Send the transition team contact information to your district contact person and GaDOE.
- 2. Conduct initial transition team meeting.
 - Required attendees must include: Governing Board Chair, Principal/School Leader, District Leadership
 - Determine meeting schedule and location. The transition team must actively meet from the time the school closure is approved to within 30 days of the school ceasing operations.
 - Finalize team assignments and review roles and responsibilities.
 - Distribute and review closure plan. The plan must include the timeline for the remaining deliverables outlined further in this closure protocol.

3. Meet according to approved meeting schedule.

Deliverable 2: Parent/Guardian Notification and Student School Assignments

1. Identify students enrolled in the school.

- The school must complete a student enrollment file that includes the following information:
 - o Student name
 - o Identification number
 - o Grade
 - Contact information
 - o Parent/Guardian
 - o Home school
 - If applicable, an indication of whether the student falls into a special population (special education, English Learner, students in temporary living situations, etc.)
- Send the complete student enrollment file to the local district contact person by the deadline set by the district.
- 2. Identify several dates and times for parent/guardian community meetings re: the school closure decision and student options for neighborhood schools.
 - The meetings should take place at the school.
 - There must be more than one meeting to accommodate parent/guardian schedules (weeknight/evening and weekend/day).
- 3. Notify parents/guardians of the school's closure.
 - A closure letter must be sent to parents/guardians by the deadline set by the district.
 - A copy of the closure letter must be sent to GaDOE.
 - The letter must include the following information:
 - Confirmed dates and times for parent/guardian community meetings. Inform parents/guardians that district leadership will be present at these meetings to answer questions about transitioning students back to their neighborhood schools.
 - The name and contact information of who to contact for student record information.
 - o A request to re-confirm student contact information (i.e., update phone numbers, addresses).
 - A list of other educational options students may be eligible for including traditional public schools and private schools.
 - The school must maintain its website for a minimum of six (6) months from the date the school ceases operations. On its website, the school must post the following information:
 - o The meeting dates and times of parent/guardian community meetings.
 - A list of other educational options students may be eligible for including traditional public schools and private schools.
 - The name and contact information for the person(s) responsible for collecting the student record information and how student record information can be obtained.
- 4. Conduct parent/guardian community meeting at the school by the deadline set by the district.
 - Review school closure decision with attendees.
 - Discuss student education options with attendees, including traditional public schools and other charter schools. Discussion should also include options for special student populations.
 - District leadership should answer questions regarding the student transfer process.
- 5. When notified by parent/guardian, verify student's new school assignment and send copy of complete student file to new school. If student does not identify a new school by May 1, identify student's home school and send copy of complete student file to home school.

Deliverable 3: Student Records

- 1. Ensure that final report cards are given to parents/guardians by the deadline set by the district and copies are mailed to them prior to the last day of school.
- 2. Locate and prepare originals of all students' permanent and temporary records to give to the local school district.
 - For special education students, ensure Individualized Education Programs (IEPs) are all finalized and in compliance with updated benchmarks and IEP report cards.
 - For English Learner (EL) students, ensure student files include a copy of the Home Language Survey, screener test, ACCESS reports, and/or other documentation required by the EL program.
 - District leadership will contact the designated transition team member to schedule a time to collect all student records.

Deliverable 4: Faculty/Staff Notification and Employee Records

- 1. Notify faculty/staff of the school's closure.
 - A closure letter must be given to all school staff by the deadline set by the district.
 - The notification must include the following information:
 - Address faculty/staff concerns about the closure.
 - Employee benefits.
 - Name and contact information of who to contact for employee records.
 - An official separation letter.
 - A copy of the closure letter must be sent to the local district and GaDOE.
- 2. Locate and prepare originals of all employee records to give to the local school district. District leadership will contact the designated transition team member to schedule a time to collect all employee records.

Deliverable 5: Financial Records and Obligations

- 1. Provide local school district and GaDOE with a complete analysis of remaining school funds at the time of the school closure decision.
 - The analysis must include identification of remaining funds originating from the local district, state agency and/or a federal agency.
 - Pending steps identified below, any public funds surplus remaining at the time the charter schools ceases operation shall be remitted to the local district or GaDOE, whichever is appropriate, within 30 days of ceasing operations.
 - Any unspent funds received from any local, state or federal agency must be refunded to that local, state, or federal agency within 30days of ceasing operations unless another date is agreed upon in writing by the applicable local, state or federal agency. Proof of funds refunded to the appropriate local, state or federal agency must be sent to GaDOE within 10days of submission.
- 2. Provide local school district with a complete list of creditors, utility providers, and/or independent contractors by the deadline set by the district.
 - This list must include vendor name, contact information, outstanding amount due, and any vendor credits. Also include any outstanding contracts (leasing, equipment service agreements).
 - Contact vendors and request invoices to be sent with, or immediately after, receipt of goods and services.
 - Contact utility providers and provide a cut-off date for utility services.
 - Terminate/cancel any outstanding contracts.
 - All outstanding payments must be paid by the deadline set by the district. Neither the LBOE nor the SBOE will be responsible for the school's unpaid debts in the event the school does not have sufficient funds to pay all of its debts at the time it ceases operation.

- 3. If the school has internal accounts, all internal accounts must be recorded, balanced, and verified. Provide internal account supporting documentation to the local school district.
- 4. Inform any 501(c)(3) and/or any organization that conducts fundraising efforts on the school's behalf of the school's closure. Confirm with district that the organization is no longer raising money on the school's behalf.
- 5. Deposit all funds with the school Treasurer. The transition team's financial representative must reconcile the Treasurer's receipts with the bank deposits to ensure proper accounting of all funds. Confirm with district that funds were deposited and reconciled.
- 6. Close the school's checking account and any investment account(s). Provide bank documentation (written, signed notice) to the district to prove that the account(s) has been closed.
- 7. Process all payroll adjustments prior to the last day of employment, including any deferred payments for teachers.
 - Acceptable documentation must be available to support adjustment/overtime and include proper authorization/approval.
 - Provide documentation of payment of payroll taxes and that relevant federal and state tax returns have been filed.
- 8. Pack and transfer all school business records (including legal, food service records) to the Board Trustee. The school must clearly mark all files and ensure all supporting documentation for financial transactions are included in the files.

Deliverable 6: School Asset Inventory

- 1. Provide an asset inventory to the district and GaDOE that documents all assets purchased by the school.
 - Inventory includes (but is not limited to) A/V equipment, white boards, computers, telephones, LCD TVs, projectors, furniture, equipment, and instructional materials.
 - The asset inventory list must include the following information:
 - Item description
 - Serial or tag number
 - o Model or style
 - o Make or vendor
 - Date purchased
 - o Asset cost
 - Funding source (must specify if asset was purchased with funds originating from a local, federal and/or state agency)
 - o Location of assets within the school
- 2. Provide the district and GaDOE with the school's plans for use of Title funds and other grant funds, including Charter Schools Program (CSP) Federal Planning, Implementation, and Substantial Expansion Grant funds. Plans will be used to validate assets purchased using Title/grant funds and determine how assets will be handled.
- 3. District and/or GaDOE representatives will contact the designated transition team members to schedule a visit to the school to validate the asset inventory. There may be several visits to the school during the asset inventory process.
 - The school must inform all employees to bring all technological devices to the school for the asset inventory.

- The school must not dispose of broken equipment until after asset inventory has been validated by the district and/or GaDOE.
- 4. Assets purchased with CSP grant funds must be redistributed to other charter schools by GaDOE pursuant to federal regulations (34 C.F.R. § 74.34). Assets purchased with public funds or funds originating from the local district, state agency or federal agency must be delivered to the local school district and/or GaDOE, whichever is appropriate, within 30 days of the school ceasing operations. District and/or GaDOE representatives will contact the designated transition team member with instructions on how to handle all identified assets.

Deliverable 7: Annual Report and Financial Audit

- 1. Conduct a final school financial audit after the school is closed by November 1.
- 2. Submit a final Annual Report Form to GaDOE no later than November 1.

A copy of all correspondence to staff, parents, creditors, the local school district, and GaDOE related to the locally-approved charter school closure protocol outlined above must be maintained by the charter school's transition team members.

_	partment of Education er Schools Division		
Federal Charter Schools Program Su	bgrant Project Monitoring Checklist and F	Report	
Date:	Sub-Grantee:		
Project Title:	LEA:		
Total Subgrant Amount:	FY21 Amount Awarded to School:		
Visit Number:	School Year Reviewed:		
Preparation Prior to Visit (for Charter School Divisi	on Staff).		
Review the following:	on stanj.		
nevew the following.		Yes No	N/A
School's Budget- compare to budget as outlined in s	subgrant.		T I
Most recent audit report.	5		
Invoices for state schools.			
School's subgrant application including all attachme	ents.		
Has school submitted complete reports as required			
Do submitted reports show the school is making pro			
application?			
Has the completed budget been submitted into Cor	nsolidated Application?		
Has the completed budget been approved in Conso			
If the school is not new, was its audit report submit			
			1 1
Site Visit Participants			
· · · · ·		Yes No	N/A
Required Attendees: Board Chair and Treasurer, sc	hool leader, and school's business manager.		
Preferred Attendees: Representative from local dis	trict and representative from Charter		
management company if applicable.	thet, and representative nom charter		
List participant names, title, and role:		-	
		_	
L			
Purpose of Visit (check if applicable):			
		Yes No	N/A
Routine on-site monitoring			
Second visit to school			
Monitoring triggered by identified problems. If chee	cked, please explain.		
			·'
		-	

Financial Documentation at School			
Financial Records and Claims for Reimbursement:			
	Ves	No	N/A
Are claims for reimbursement submitted to the LEA/SEA on time (approx. within 30			
days) and accompanied by documentation for expenditures?			
Did the LEA reimburse the charter school within 30 days of receipt of the claims for			
reimbursement?			
Are expenditures authorized by the correct staff person(s)?			
Do expenditures match with the budget submitted by the school?			
Were any problems identified with the financial reporting to date? (ie, Unallowable			
expenses)			
amendment?			
			<u> </u>
Salaries	N.	N1-	NI / A
More normall records and ided? Note: Drugell records should not include toward	Yes		N/A
Were payroll records provided? <i>Note: Payroll records should not include taxes.</i>			
If there are hourly employees, were timesheets provided?			
Professional Development			
	Yes	No	N/A
Does school have copies of itineraries or course descriptions for staff that participated			
in professional development?			
Are there are timesheets for all attendees?			
Did attendees submit correct documents for reimbursement of expenses?			
Travel Expenditures			
	Yes	No	N/A
Does school have copies of itineraries for staff that traveled?			
Does school have all receipts and proof of expenditures submitted by staff?			
Do travel expenses show mileage/per diem costs and receipts for expenses?			
Is school familiar with federal regulations?			
Consultant Expenditures- a consultant is a person not an employee of the school provi	dina s	ervic	es. A
company providing consulting services is a vendor and would provide invoices to the sc	-		
	Yes	No	N/A
If services provided were above \$50,000 was a bidding process followed? A school's			
request for bid must follow or be more stringent than state guidelines.			
Does school have a copy of bidding process or RFP used?			
If bid was done, does school have documentation of the bid process such as			
comparision of quotes received?			
Is there a contract between the school and the consultant outlining services provided			
by the consultant to the school?			
	<u>د ا</u>	-	·

Does school have resume or CV from consultant?		
Does contract contain conflict of interest clause?		
Does contract clearly detail the deliverables and deadlines for each to be completed		
by the consultant?		
Does school staff interviewed confirm the consultant provided all services outlined in		
the contract on-time and that services were performed well?		
Does school have documentation for method of payment to the consultant?		
Did school send consultant proper tax documents such as a W-4 or 1099?		

Yes No N/A

Invoices	

Documentation provided by school are not statements or quotes, but actual invoices. Were invoices billed to the school? Were invoices originated directly from the vendors?

Does documentation show goods were shipped to the school?

Does documentation show goods were received by the school?

Although partial invoices are acceptable, did school mark them as partial?

Does documentation show school has a PO linked with each invoice?

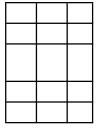
Does documentation show proof and method of payment to vendors?

Property Management

The Code of Federal Regulations (CFR) mandates that "property records must be maintained that include a description of the property, a serial number or other identification number, the source of property, who holds the title, the acquisition date, and cost of the property, percentage of Federal participation in the cost of the property, the location, use and condition of the property, and...(2) A physical inventory of the property must be taken and the results reconciled with the property records at least once every two years. (3) A Control system must be developed to ensure adequate safeguards to prevent loss, damage, or theft of the property. Any loss, damage, or theft shall be investigated. (4) Adequate maintenance procedures must be developed to keep the property in

Yes No N/A Has any equipment been purchased with subgrant funds? If yes, does the subgrantee have an inventory system in place to control, protect, preserve, use, maintain and track the property? Is inventory system computer based? Is all equipment labeled? Note: Equipment purchased with federal CSP funds should have its own label. Are the items are secured within the school (are computers locked, classrooms locked when no one is there)? Conduct random check of equipment purchased. If yes list items were checked. For equipment in excess of \$1,000 was a bidding process required? Does school have a copy of bidding process or RFP used? If bid was done, does school have documentation of the set of the Page e161 comparision of quotes received?

EMO fees Office furniture (does not include classroom furtniture) Cafeteria equipment- not tied to direct instruction, operational not implementation (Exception: Culinary Pathway) Extracurricular activities Any leases



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Internal Policies			
	Yes	No	N/A
Have appropriate school policies regarding the following matters been established,			
and are they adequately documented and communicated:			
Acceptable business practices?			
Conflicts of interest?			
Codes of conduct?			
Physical security of school's property e.g. are laptops put in locked classrooms? Does the school's management have policy in place which explains what procedures are followed for purchases within certain dollar limits? Does documentation provided by school show the expenditures policy is followed in the every day operations of the school? Does school have written documentation for staff regarding internal controls?			
Does the school's management have procedures in place for corrective action i.e.			
additional training if there are deviations from established controls?			
Internal Control Activities	Yes	No	N/A
Does the school conduct performance reviews of staff ?			
Who conducts the performance reviews?			
Are the segregation of duties policies followed by staff?	-		
Has there been an instance where management has overridden an internal control?			
If yes, describe:		<u> </u>	
Fraudulent Behavior			
	Yes	No	N/A
Is school staff interviewed aware of any type of:			
Fraudulent behavior?			
Accusations of fraudulent behavior?			
If yes, describe:			
Was corrective action taken by the school?			
If yes, describe:		1	.

Internal Documentation Checklist					
Has the charter school representative provided copie	es of:	-	Yes	No	N/A
Procedure manuals?		L			
Organizational charts?		L			
After the review of all available financial records and	policies are there ar	iy:			
Control deficiencies?		Γ			
Check Signature Policy Compliance. Are authorizatio	ns for purchases, tra	vel, etc			
signed off on by the correct staff person(s)?	1 2				
		L		•	
If deficiencies are identitied during the visit, are they	significant?				
If yes, describe:					-
Are there material weaknesses with internal controls	s followed at the scho	pol?			
If yes, describe:					
Authorized Check Signers					
to indicate an eligible second signee)	Authoriza	tion Limit			
*indicates an eligible second signee					
		ount			
second signee?	\$				

Student Access
Describe the charter school's recruitment, admissions, lottery, and enrollment policies and procedures.
What is the charter school's student FTE data (e.g., total enrollment, FRL, race/ethnicity, SPED, EL)? How does this FTE data compare to your attendance zone? How does this FTE data compare to the entire school district?
Describe the charter school's discipline policies and procedures. How many and/or what percentage of students receive in-school suspension? Out-of-school suspension? Expulsion?
How do these numbers compare across student sociodemographics (including among SPED students)?
Describe the charter school's procedures and practices for working with English Language Learners.
Describe the charter school's procedures and practices for working with students with disabilities. Are there counseling services? How does the charter school comply with "Child Find"? How does the charter school work with the district to provide SPED services and supports?
Describe the charter school's procedures and practices for working with students from low-income communities/families.

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Overall Subgrant Status			
	Yes	No	N/A
Are the projects described in the charter school's subgrant application being implemented on schedule?			$\left \right $
Are all procedures relating to grant management being followed and documented? Does the subgrantee provide regular progress updates?			
Is the subgrantee meeting goals outlined in the subgrant application?			
If no, describe:			
Have subgrant requirements been complied with in accordance with CSP standards?			
Are project revisions or an amendment required?			
If yes, describe:			
Is technical assistance or training needed?			
If yes, describe:			
Are corrective actions recommended?			\square
If yes, describe:			
Overall Impression of Handling of Financial Procedures at the Charter School			
	Yes	No	N/A
Does school staff interviewed seem to be familiar with the subgrant?			
Does school staff interviewed seem to be familiar with purchasing procedures?			
Does school staff interviewed seem to be familiar with regulations regarding travel? Does school staff interviewed seem to be familiar with how business transactions are initiated, approved, recorded, processed, and reported?			
Was school staff interviewed able to find items requested easily or did they seem disorganized and/or confused?			
Overall Student Access Compliance Findings			

Is the school complying with all applicable student rights' requirements?	Yes No	0 N/	A]
If no, describe:			
Are corrective actions recommended? If yes, describe:]

S	School Walk-Thr	ough Checkli	st	
School Appearance - External				
Grounds are clear of litter	Y	N	N/A	
No extraneous people on the school grounds	Y	Ν	N/A	Notes
Grass is cut	Y	Ν	N/A	
Windows are clean	Y	N	N/A	
Windows may have student work in them	Y	Ν	N/A	
Sidewalks and parking lots are in good repair	Y	Ν	N/A	
stairs)	Y	Ν	N/A	
Security				
Exterior doors securely locked	Y	Ν	N/A	
Idenitification	Y	Ν	N/A	
building	Y	N	N/A	Notes
Identification	Y	Ν	N/A	
Staff takes notice that visitor has appropriate ID	Y	Ν	N/A	
School Appearance - Internal				
Hallways are clean, free of litter and clutter	Y	N	N/A	
Bathrooms are clean and in good repair	Y	Ν	N/A	Notes
sanitary	Y	N	N/A	
Classrooms are well maintained	Y	Ν	N/A	
Walls and include bright colors	Y	N	N/A	
Building hallways and classrooms are well-lit	Y	Ν	N/A	
School Culture				
isolated, sitting in the hallway, etc.)	Y	Ν	N/A	
wandering the hallways	Y	N	N/A	Notes
Hallways display student work and artwork	Y	Ν	N/A	
Student work is relatively free of errors	Y	N	N/A	
classrooms, data wall, etc.)	Y	Ν	N/A	

(continued)

	School Walk-Thr (continu	-	st	
Classroom Culture				
visitors arrive	Y	Ν	N/A	
Daily schedule is posted	Y	Ν	N/A	
Standards being addressed are on the board	Y	Ν	N/A	Notes
Essential questions are on the board	Y	Ν	N/A	
Students are arranged in groups (not rows)	Y	N	N/A	
learning and why	Y	N	N/A	
artwork, learning charts, etc.	Y	N	N/A	

harter contract Complete financial records available for review	Y Y	N	N/A N/A	Notes
view	Y	Ν	N/A	
ther Observations				J

Charter Schools Division Project Monitoring Checklist and Report - Attachment A) 1		
Monitoring Grant Objectives - Attachment A) 1		
Completion Status (Complete or % to Completion)		
(comprose of comprosed)		

Charter Schools Division		
Project Monitoring Checklist and Report - Attachment A) 2		
Monitoring Grant Objectives - Attachment A) 2		
Objective Listing and Individual Status		
GOAL 2		
	Completion Status (Complete or % to Completion)	
Are activities on schedule according to the CSP grant application?	ו	
	J []	
Were any unique or special activities or accomplishments identified?		
Is the school on track to meeting this objective by the end of the grant term?		

Charter Schools Division		
Project Monitoring Checklist and Report - Attachment A) 3		
Monitoring Grant Objectives - Attachment A) 3		
Objective Listing and Individual Status		
GOAL 3		
	Completion Status	
	(Complete or % to Completion)	
	¬	
Are activities on schedule according to the CSP grant application?		
Were any unique or special activities or accomplishments identified?		
Is the school on track to meeting this objective by the end of the grant term?		

Charter Schools Division		
Project Monitoring Checklist and Report - Attachment A) 4		
Monitoring Grant Objectives - Attachment A) 4		
Objective Listing and Individual Status		
GOAL 4		
	Completion Status (Complete or % to Completion)	
Are activities on schedule according to the CSP grant application?		
Were any unique or special activities or accomplishments identified?		
Is the school on track to meeting this objective by the end of the grant term?	Yes	

Charter Schools Division		
Project Monitoring Checklist and Report - Attachment A) 5		
Monitoring Grant Objectives - Attachment A) 5		
Objective Listing and Individual Status		
GOAL 5		
	Completion Status (Complete or % to Completion)	
Are activities on schedule according to the CSP grant application?		
Were any unique or special activities or accomplishments identified?		
Is the school on track to meeting this objective by the end of the grant term?		



Facility Resource Center: Background and Launch

Two recent studies examined Georgia's charter school facility and finance landscape and recommended ways to increase charter schools' access to affordable capital and reduce reliance on predatory lenders. One study released in January 2019 by the State Charter Schools Foundation of Georgia (SCSF) and conducted by Level Field Partners (LFP) provided a landscape analysis of Georgia's charter school facility and financing environment. The analysis and subsequent report identified the types of challenges that Georgia charter schools face in their pursuit of affordable facilities. The report's findings highlight general facility procurement issues as well as a predatory charter school lending environment that has been enabled through the state's lack of investment in meaningful programs or funds that would provide charter schools access to more affordable capital.

As second study released in May 2020 titled *The State of Charter School Facilities in Georgia: A Comprehensive Understanding and Landscape Analysis of Facility Needs Across the State* was conducted by Cameron Quick in partnership with the Tennessee Charter School Center and the National Association for Public Charter Schools. The study examined charter schools in Georgia and identified several key finance-related findings including the existence of a growing sector where 1) the majority of *operational* schools lack the requisite facility space to accommodate anticipated enrollment and 2) the majority of *proposed* schools are forced to utilize more expensive privately owned facilities since they have little or no access to more affordable district-owned facilities, and 3) even those charter schools operating in district-owned facilities are typically required to pay rent and finance the maintenance and operation of the building(s) even though the schools retain no equity in the capital asset (making it difficult to obtain outside financing when required or to build a budget reserve).

GCSA's Facility Resource Center (FRC) was established in 2020 to address many of the facility procurement and finance-related challenges identified in the recent studies of Georgia's charter school landscape. Because errors made in the early stages of facility development can end up costing charter schools millions of dollars and crippling their long-term financial health, the FRC provides hands on technical assistance during each phase of charter school facilities development. Schools utilize the FRC to PLAN, FUND, and BUILD their facilities and to access resources and tools specifically created for the Georgia market.

Facility Resource Center Offerings

The GCSA Facility Resource Center was established to assist charter schools identify their financing needs, strategize the developmental goals, and position themselves to benefit from the financing markets. The FRC pairs continuous market evaluations with the customized support and solutions charter schools need to successfully navigate the facility market.

Specifically, the FRC assists schools by:

- Providing technical assistance and hands-on individualized support related to facility procurement and financing supports,
- Administering grant programs for facility support/loans
- Facilitating meaningful professional learning communities (PLCs) that address critical knowledge gaps for both schools and vendors,
- Contributing to the maturation and stabilization of the short term/early financing market
- Helping to a stabilize long-term debt solutions
- Housing and deploying charter school facility initiatives including federal credit enhancement programs and foundation programs.
- Providing critical/triage support when issues arise
- Reducing schools' cost of borrowing.
- Developing short and long-term policy solutions/recommendations

FRC Expertise

Our greatest asset is our team. In order Georgia's charter schools, our team is comprised of charter experts with decades of development experience across the nation, and a passion for education and the betterment of the communities our schools are serving. GCSA's FRC staff and consultants are listed below.

Cameron Quick, GCSA Facility Resource Center Director

Cameron has spent over a decade supporting charter schools across the country. In that time, he launched the first Facility Resource Center in the country which has since replicated in several other states—including Gerogia. In the past five years he has brought over \$600 million in facility resources to charter schools across the country, and continues to be a lead facility expert for national programs and federal grants designed to support charter schools navigating the real estate process. In addition to his role as GCSA Facility Resource Center Director, Cameron serves as a team member for the Charter School Facility Center, a project of the National Alliance for Public Charter Schools; founder and developer of The Lending Project, a free online loan matching platform for charter schools, and an expert consultant for all charter school facility needs for the Tennessee Charter Schools Center.

Lee Chaffin

• Lee has more than 14 years of experience in project construction management within the public charter school industry. He has developed and executed facility capital plans for numerous

organizations and provided project management technical assistance for clients in Arizona, Arkansas, California, Georgia, Illinois, Louisiana, Maryland, Missouri, Nevada, New Jersey, New York, North Carolina, Pennsylvania, South Carolina, Texas, and Washington DC. He most recently managed the client service division of LISC: SchoolPrint's 2- year pilot program funded by the Walton Family foundation which was created to provide a smooth path for schools in their facility development process.

Sajan Philip, GCSA FRC Consultant

Sajan has had a 15-year career in finance, in which he deployed over \$600 million in capital to a variety of real estate community-based projects. These projects include affordable housing, school facilities, early childhood education facilities, health centers, and supermarkets. He has experience with a broad range of financial resources available to community development projects, including foundations, government programs, banks, CDFIs, tax exempt bonds, NMTC, and LIHTC. In his time at Civic Builders, Sajan built a philanthropic-backed lending platform that delivered low-cost flexible loans to high performing nonprofit charter schools. This platform is on track to grow loan production from \$20 million in 2018 to over \$125 million in 2020. Prior to joining Civic, Sajan was Market Director of the Mid-Atlantic and Central Regions at the Low Income Investment Fund (LIIF). In this role, he was responsible for lending production in DC as well as for LIIF's expansion in the Southeast. At LIIF, Sajan lent over \$300 million in capital for community development projects, including a \$30 million fund dedicated to increasing healthy food access in food deserts. Before joining LIIF, he was a small business loan underwriter at Seedco Financial in New York City.Lee Chaffin, GCSA FRC Consultant

Lauren Mulholland, GCSA FRC Consultant

• Lauren has spent the past decade working alongside organizations ensuring they operate and function to their fullest potential. She has coordinated and worked with every newly authorized charter school across the state of Georgia ensuring a successful launch from concept, to site analysis and successful opening.

Dave Mason, GCSA FRC Consultant

 Dave has worked in project and operations management for over 15 years and is a skilled marketer and natural networker with a proven track record of building and growing relationships - bringing social science and business analysis to marketing; stemming from research experience, business development, project and vendor management, and emerging social media exposure. Working with research-based marketing and strategy consultancy, Kelton Global, for the last 10+ years, and cofounder of purchasing consortium, Together Unified, Dave's roots are in marketing and business operations.

Press Releases

Georgia's Public Charter Schools See Growth Amidst Pandemic

Georgia experienced a 9% increase in charter school enrollment

Wednesday, Sept. 22

According to state-level data analyzed by the National Alliance for Public Charter Schools in a new report, <u>Voting with Their Feet: A State-level Analysis of</u> <u>Public Charter School and District Public School Enrollment Trends (https://www.publiccharters.org/enrollment</u>), Georgia's public charter school enrollment grew by 9% or 6,973 students during the 2020-2021 school year. Charter schools in Georgia were also the only public schools to grow their enrollment during that time period. This trend is likely to continue. New statewide <u>polling (https://bit.ly/3tYe2FU)</u> shows 65% of Georgia's registered voters support public charter schools.

Nationally, enrollment in public charter schools increased by **7**%, or almost **240,000** students, from the 2019-20 school year to the 2020-21 school year. By contrast, district public school enrollment dropped by **1.4 million** students, the largest decrease in more than a decade. In Georgia, traditional public schools experienced a **nearly 3%** decline.

"We believe more Georgia families chose to send their children to public charter schools during the pandemic because charters listened to their local communities when deciding whether to deliver virtual, in-person or hybrid learning options," said **Tony Roberts, President and CEO of the Georgia Charter Schools Association**. "Charter schools have the ability to move quickly to meet the individual needs of their students. Many have also provided additional services and supplies to families in need during this challenging time."

In 2020, the COVID pandemic forced schools of all types to close their doors and switch to remote learning. Many families were dissatisfied with the quality of learning options available to their children, and that dissatisfaction led them to pursue other available educational options. For many families, charter schools' nimbleness and flexibility made them the right public school choice.

"As Georgia's largest public school, GCA is proud that we have been able to offer our students and their families educational continuity in a results-focused environment during this challenging time," said Angela Lassetter, Superintendent of Georgia Cyber Academy. "We are grateful that we had the ability to expand and serve more of Georgia's families when they needed a safe and high-quality educational option the most and for the support of our board, authorizer, faculty, and staff to do so. Our proven best practices for virtual learning have not only led to enrollment growth, but to continued gains in academic performance despite the many challenges presented during this pandemic.

According to data published by the Georgia Department of Education, both state and local charter schools experienced an increase in enrollment during the 2020-2021 school year. However, the enrollment growth was most noticeable in state charter schools authorized by the State Charter Schools Commission of Georgia. Between the 2019-2020 and 2020-2021 school years, state charter schools experienced a more than **16**% increase.

"In these extraordinary times, families want options that meet their students' unique learning needs," said Lauren Holcomb, Executive Director of the State Charter Schools Commission of Georgia. "As public schools of choice, state charters have served as a vital public resource and met unprecedented demand from communities seeking innovative, quality options for their students."

State charter schools with notable enrollment increases between the 2019-2020 and 2020-2021 school years include Ethos Classical (90.9%), Genesis Innovation Academy for Boys (18.4%), Georgia Cyber Academy (28.7%), Resurgence Hall Charter School (17.6%) and Utopian Academy for the Arts (53.7%).

Enrollment grew by more than **3**% in Georgia's locally-approved charter schools during the same time period. Atlanta Public Schools (**3.9**%) and Chatham (**19.3**%), Clayton (**271.9**%), Fulton (**8.1**%), Douglas (**0.7**%) and Chetwer and

Georgia is one of 42 states that saw increases in public charter school enrollment during the 2020-2021 school year.

"Charter school enrollment grew in nearly every state – and this trend is not slowing down. Families are voting with their feet as they seek out more and different public school options for their children," said Nina Rees, President & CEO of the National Alliance for Public Charter Schools. "It is wonderful to see the data prove what I hear from families of charter school students every day: Public charter schools are answering their call."

Rees continued, "There is a strong and growing demand for charter schools. In state after state, families are enrolling their children in these innovative, student-centered public schools. Charter schools are an important part of the public education ecosystem. Without them, overall public school enrollment declines would have been far worse, and many families would have suffered even more during this time of unprecedented challenge."

About Georgia Charter Schools Association

The Georgia Charter Schools Association is a nonprofit membership organization for Georgia's public charter schools and petitioners. GCSA supports, fosters, and advocates for the development of high-quality public charter schools and networks that improve opportunities for Georgia students. We believe every child in Georgia should have equal access to a high-quality, transformative public education.

Charter schools are public schools, free, and open to all. They do not have selective enrollment processes. Charter schools are publicly funded by local, state, and federal tax dollars based on enrollment, like other public schools, and are held to the same academic standards that all public schools are required to meet. In addition to operating as public schools, charter schools are also responsible for adhering to the promises laid out in their charter agreement another layer of accountability. The charter school's authorizer is responsible for enforcing these rules. If they don't, the charter school will no longer serve students and families. All charter schools are held directly accountable by their families and communities, in addition to public school standards.

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Press Releases

Majority of Voters Support Public Charter Schools & Statewide Charter Expansion

New Poll Finds Nearly Two-Thirds of Georgia Voters Favor Public Charter Schools

Wednesday, Sept. 15

ATLANTA—Public charter school support remains strong in Georgia. 65%, or more than six out of every ten registered voters in Georgia, hold favorable views of public charter schools. That's according to a new public opinion poll conducted on behalf of the Georgia Charter Schools Association in July. Respondents say the most positive aspects of public charter schools include their small size, their ability to offer individualized student support and their accommodation of different learning styles.

The survey also found that 56%, or more than half, of registered voters favor expanding the number of public charter schools in Georgia.

The Public Opinion Strategies poll comes a year-and-a-half after the start of the COVID-19 pandemic.

"These findings continue to show there is strong demand and support for public charter schools throughout the state of Georgia," said Tony Roberts, President and CEO of the Georgia Charter Schools Association. "We believe the COVID-19 pandemic has only heightened the need for more high-quality public charter schools in our state. These innovative public schools are important to Georgia's overall public school system because they meet the individual needs of students and successfully prepare them for the future. "

Georgians of all political affiliations approve of public charter schools.

The majority of Georgia Democrats, Republicans and Independents all hold favorable views of public charter schools. According to survey results, **61**% of Republicans, **56**% of Independents and **55**% of Democrats in the survey indicated their support for public charter schools.

A diverse coalition of Georgia voters supports public charter school expansion.

Parents (59%), parents of color (61%), the majority of voters in all political parties (56%), Republicans (62%), Democrats (52%), Independents (51%), urban residents (63%), voters with college degrees (60%), respondents with some college attendance (60%), metro Atlanta residents (57%), Southeast Georgia residents (60%), and Southwest Georgia residents (57%) favor adding more public charter school options to the state.

Parents want public charter school expansion in Georgia.

Parents who took part in the survey were slightly more supportive of expanding the number of public charter schools in Georgia than nonparents. **59**% approve of adding more charter schools to Georgia versus **54**% of non-parents. Female parents overwhelmingly back the expansion of Georgia charter schools with **62**% expressing approval. **56**% of Male parents support the addition of more charter schools in the state.

Opposition to public charter schools and their expansion in Georgia is low.

Only 13% of those polled expressed negative views about charter schools, and 21% of respondents were not in favor of charter school expansion. The remaining respondents were unsure whether they support public charter schools or the addition of more charter schools in Georgia.

Methodology: The statewide telephone survey was conducted July 26-29, 2021, with 600 registered Georgia voters. The survey has a margin of error of ±4.00%.

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https://gacharters.org/press-releases/majority-of-voters-support-public-charter-schools-statewide-charter-expansion/

About Public Opinion Strategies

Public Opinion Strategies is a market research company based in Alexandria, VA specializing in political, corporate and public policy research. Since the company's founding in 1991, Public Opinion Strategies has completed more than 22,000 research projects and interviewed over 10,000,000 Americans across the United States.

CONTACT: Michelle Wirth Senior Director of Communications Georgia Charter Schools Association <u>mwirth@gacharters.org (http://mwirth@gacharters.org/)</u> 470-233-6682 **f** Facebook 0 **Y** Twitter 1 **in** LinkedIn 0

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Press Releases

Statewide Poll Shows Strong Support for Public Charter Schools

For Immediate Release

Thursday, Sept. 10

Two-thirds of Georgia voters favor public charter schools

ATLANTA—Georgia voters overwhelmingly support public charter schools. Two-thirds, 67%, of likely voters participating in a Cygnal public opinion poll expressed favorable views of public charter schools. The survey of 640 likely voters also found that a sizeable percentage of parents who live in metro Atlanta (72%) and (75%) in South and East Georgia would send their children to a public charter school if one was available in their community.

Survey respondents also expressed that they want additional public school options, full funding for existing charter school grants, and they are less likely to vote for a candidate that would maintain status quo funding for school districts only offering virtual learning and taxpayer funding for education in Georgia should follow the child. The advanced multi-mode survey of Republican, Democratic, Independent and undecided voters was conducted between Aug. 22-Aug. 24, 2020.

"These findings support what we have long known to be true in Georgia," said Tony Roberts, President and CEO of the Georgia Charter Schools Association. "For years, we have seen strong demand by families seeking to enroll their children in a Georgia public charter school. In 2012, a supermajority of Georgia voters backed an amendment to reestablish a state authorizer for charter schools in Georgia's constitution. Families in our state continue to believe that public charter schools put the needs of students first and positively contribute to Georgia's overall public school system."

Georgia voters of all races and political affiliations approve of public charter schools.

The public opinion poll found that Georgia voters of all racial demographics support public charter schools. 83% of Asian voters, 83% of Latino voters, 67% of White voters and 65% of Black voters expressed a favorable opinion of charter schools. According to survey results, 73% of Independents, 68% of Republicans and 64% of Democrats say they support public charter schools.

More than half of Georgia's parents want more free public-school options.

52% of Georgia parents who were surveyed say they want additional free public school options. The creation of more public school options was especially important to low and middle-income Georgians. 54% of respondents who made less than \$50,000 annually and 58% making between \$50,000-\$90,000 say more free public school options are needed. Both Democratic (55%) and Republican (51%) voters agreed that more public school choices are necessary. Only 20% of Georgia parents say they are not in favor of additional public school options for students.

Georgia voters support fully funding existing charter school grants.

56% of voters support the state fully funding the charter school grants it has already created. This includes 50% of teacher households and 75% of parents. It is especially popular with 18-34-year-olds, Republicans, Independents, low-income voters, college-educated voters, and those living in Metro Atlanta. The grants are opposed by just 26% of voters.

Georgians want funding reductions for districts that only offer distance learning.

More than half of Georgia voters (52%) who were surveyed say they are less likely to support a state lawmaker who votes to continue funding school districts at the same level if they're not offering full-time in-person learning. Only 27% percent of voters were more likely to support a state legislator who continues for school districts that have no in-person learning options for students. This survey was conducted as many Georgia families have students participating in distance and hybrid learning due to the COVID-19 crisis.

Taxpayer money should follow the child. PR/Award # S282A220006 Page e182 https://gacharters.org/press-releases/statewide-poll-shows-strong-support-for-public-charter-schools/

Statewide Poll Shows Strong Support for Public Charter Schools - Georgia Charter Schools Association

64% of Georgia voters believe that the money should follow the student and those funds do not belong solely to the district. They want children to be able to use the state funds that are allocated for their education in the school that best fits their needs whether it be public, private, magnet, charter, virtual, or homeschool (70% agree and 22% disagree). Additionally, respondents say they are more likely to support a legislative candidate who supports school choice (53%). These polling results come as a number of Georgia families examine different educational options for their children as a result of the COVID-19 pandemic.

Methodology: The survey was conducted Aug. 22-24, 2020, with 640 likely general election voters. It has a margin of error of ±3.87%. A group of known voters who were likely to vote in the 2020 General Election was randomly selected and interviewed via live agents calling cell phones and landlines, and voters received invitations to participate in the survey via SMS and email with a secure link tied to their voter record. The survey was weighted to a likely general election universe.

About Georgia Charter Schools Association

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About Cygnal

<u>Cygnal (https://www.cygn.al/)</u> is an award-winning national public opinion and predictive analytics firm that pioneered multi-mode polling, peer-to-peer text collection, and Political Emotive Analysis. Cygnal was named the #1 most accurate polling and research firm in the country for 2018 by The New York Times. Its team members have worked in 47 states and countries on more than 1,100 corporate, public affairs, and political campaigns.

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Statewide Poll Shows Strong Support for Public Charter Schools

Two-thirds of Georgia voters favor public charter schools

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Survey respondents also expressed that they want additional public school options, full funding for existing charter school grants, and they are less likely to vote for a candidate that would maintain status quo funding for school districts only offering virtual learning and taxpayer funding for education in Georgia should follow the child. The advanced multi-mode survey of Republican, Democratic, Independent and undecided voters was conducted between Aug. 22-Aug. 24, 2020.

"These findings support what we have long known to be true in Georgia," said Tony Roberts, President and CEO of the Georgia Charter Schools Association. "For years, we have seen strong demand by families seeking to enroll their children in a Georgia public charter school. In 2012, a supermajority of Georgia voters backed an amendment to reestablish a state authorizer for charter schools in Georgia's constitution. Families in our state continue to believe that public charter schools put the needs of students first and positively contribute to Georgia's overall public school system."

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Press Releases

Georgia's Public Charter High Schools Surpass State Graduation Rate

For Immediate Release

Wednesday, Oct. 27

ATLANTA—Georgia's public charter schools are improving the state's overall public school system by ensuring more Georgia students graduate from high school. According to data released from the Georgia Department of Education, the collective 2021 graduation rate for Georgia's charter schools is **89.1%**. That's **more than five** percentage points higher than the state graduation rate (**83.7%**). That percentage increases when brick-and-mortar (non-virtual) public charter schools are compared to the state average. Georgia's non-virtual public charter schools outperformed the state graduation rate by almost nine percentage points—92.5% compared to 83.7%.

Public charter high schools with high 2021 graduation rates include Baconton Community Charter School (100%), Lake Oconee Academy (100%), Pataula Charter Academy (100%), Academy for Classical Education (99.1%), Charles R. Drew Charter School (99%), Walton High School (96.1%) Statesboro STEAM Academy (95%), Hapeville Charter Career Academy (94.2%), Tapestry Public Charter School (93.8%), Atlanta Classical Academy (92.7%), Cairo High School (92.3%), Furlow Charter School (86.4%), KIPP Atlanta Collegiate (85.2%) and Berrien Academy Performance Learning Center (84.2%).

"We commend these public charter high schools for helping students cross the finish line and successfully preparing them for college and future career opportunities," said Tony Roberts, President and CEO of the Georgia Charter Schools Association. "Public charter schools offer personalized attention, are often small in size and have the ability to accommodate different learning styles. These rigorous and high-quality public schools work hard to keep students engaged and ensure they receive their high school diplomas."

In addition to surpassing the state, many of these public charter high schools also exceeded graduation rates in their local districts or attendance zones. This graduation rate comparison does not include "alternative charter schools," which, by law, provide services focused on dropout prevention and credit recovery. Georgia uses a four-year adjusted cohort rate to calculate graduation rates as required by federal law.

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VOTING WITH THEIR FEET A STATE-LEVEL ANALYSIS OF PUBLIC CHARTER SCHOOL AND DISTRICT PUBLIC SCHOOL TRENDS



SEPTEMBER 2021

DEBBIE VENEY

NATIONAL ALIANCE FOR PUBLIC CHARTER SCHOOLS

DREW JACOBS

NATIONAL ALLIANCE FOR PUBLIC CHARTER SCHOOLS



Introduction

Based on data collected and analyzed by the National Alliance for Public Charter Schools, during the first full school year of the COVID pandemic, the charter sector is likely to have experienced the largest rate of increase in student enrollment increase in half a decade.

Public charter school enrollment increased during the 2020-21 school year in at least 39 states, the only segment of the public education sector to grow during the COVID-19 pandemic, according to new data compiled by the National Alliance. All told, nearly 240,000 new students enrolled in charter schools during that period, a 7% year-over-year increase. This likely represents more than double the rate of growth from the prior year. According to the analysis of data from 42 states*, Illinois, Iowa and Wyoming are the only states that saw even a modest decrease in charter school enrollment during this period. This report does not include data from Kansas, Tennessee, Puerto Rico, Guam, or any states that do not have public charter schools.

Across the country, families chose to leave their district schools in record-high numbers and polling from parents suggests this wasn't a temporary change. According to National Parents Union, 80% of the parents they surveyed said the 2020-21 school year was an eye-opening experience that also resulted in a demonstrable shift in parental involvement when it comes to their child's education and parents' desire to engage schools with more input and feedback. A majority of parents want more options for their students following the pandemic and they have no plans to return to the way things were.¹

Charter schools are public schools of choice—meaning families must make an active decision to enroll a student in one of these unique public schools. During the 2020 school year, the COVID pandemic forced many schools of all types to close their doors and switch to remote learning. Many parents were dissatisfied with the quality of what was available to their children. And that dissatisfaction led them to learn more about the other educational options available. For many families, charter schools' nimbleness and flexibility made them the right public school choice.

Of course, not all students left their district public schools for charter schools. Many families chose home schooling. In fact, a July 2021 article from the Associated Press examining homeschooling data from the U.S. Census Bureau noted that from March 2020 to September 2020 rates of homeschooling increased from 5.4% to 11%.² Some families chose to delay the start of preschool or kindergarten. Others decided to enroll their students in private schools. The reasons vary from family to family. But the unmistakable message is that something wasn't working for more than one million parents. They voted with their feet and chose options that are a better fit for their children.

In June 2021, the U.S. Department of Education's National Center for Education Statistics reported that enrollment in public schools "fell by its largest margin in at least two decades," an overall drop that equates to about a 3% loss in enrollment from 2019-20 to 2020-21.³ Leading education news outlet Education Week reached out to 51 state departments of education and found that every state saw a drop in enrollment, totaling a public school loss of 1.4 million students.⁴



Many early reports forecasted declines in enrollment as students either got lost (i.e., failed to report to virtual or hybrid instruction) or as parents made choices to move away from the public education system to home schooling or private schools.

Interestingly, during the same time period, media reports began to emerge about some states experiencing a significant increase in charter school enrollment.⁵

Intrigued by this possible pattern, the National Alliance set out to examine charter school enrollment shifts, compared to district public school enrollment shifts, from 2019-20 to 2020-21, giving a glimpse into enrollment choices made during the pandemic. The National Alliance consulted state educational agency (SEA) websites to gather the best available enrollment data to conduct a straightforward analysis of patterns in charter school and district public school enrollments.

There were significant challenges with respect to data collection because each state has its own reporting protocols. The National Alliance set a high bar for data integrity, insisting upon source data that is either generated by or verified by an SEA. Based upon these criteria, data were available from 42 SEAs, including the District of Columbia. The analysis can be found in this report. This report will be updated as additional data is made available.

To better understand the motivation behind the data, the National Alliance also spoke with parents, teachers, students, and school leaders to learn more about their personal stories.

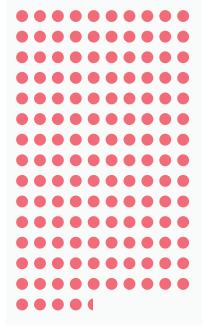
PUBLIC SCHOOL ENROLLMENT SHIFTS



237,000 Charter Students Gained



1.45 Million District Students Lost



As the nation faced the COVID-19 pandemic during the 2019-20 and 2020-21 school years, schools were forced to find innovative ways to adapt and provide high-quality instruction to students. In remarkable ways, schools, educators, and families rose to the challenge.

It is premature to draw any conclusions about why charter school enrollment grew while enrollment in district public schools declined. And yet the pattern among states in this report is undeniable. There is much to learn from families who made the switch, and perhaps the biggest lesson for everyone is how critically important charter schools are to public education. Public school enrollment declines began years ago in many cities and states. Often, this was tied to overall population decline or a shift in demographics. The pandemic merely exacerbated and accelerated what was already happening in many communities.

Charter schools are an important part of the public school ecosystem. Without them, overall public school enrollment declines would have been far worse, and many families would have suffered even more during this time of unprecedented challenge.

*Note: For the purposes of this analysis, the District of Columbia is included in the count of states.



WA MN ME wı OR ID WY мі NY NH MΔ IΔ ΡΔ RI ОН IL. ст IN NJ NV UT co DF KS мо MD VA CA DC TN NC ок AR ΔZ NM SC MS GΑ AL ТΧ LA AK GU н PR No Charter 10% to 20% +20% No Data -10% to 0% 0% to 10% Schools

CHARTER SCHOOL ENROLLMENT CHANGE BY STATE

RESULTS

- Charter school enrollment increased as district public school enrollment decreased. Across the 42 states in the analysis, charter schools gained nearly 240,000 students (a 7% increase from 2019-20 to 2020-21), while other public schools, including district-run schools, lost more than 1.4 million students (a 3.3% loss from 2019-20 to 2020-21).
- Nearly every state analyzed saw charter school enrollment increases. Across the 42 states in the analysis, there was an increase in the number of charter school students from 2019-20 to 2020-21 in 39 states. Only Illinois, Iowa, and Wyoming saw modest decreases in charter enrollment. Further, there was a decrease in district public school enrollment in every state. Increases for charter schools ranged from 49 more students in Virginia to 35,751 additional students in Oklahoma. In terms of percentages, the increase in charter enrollment ranged from 0.19% in Louisiana to nearly 78% in Oklahoma.
- Virtual charter school enrollments drive part of the change. Although a school-level analysis was not conducted as a part of this paper, in some states (e.g., Oklahoma, Pennsylvania, and Utah), charter school enrollment increases were primarily driven by enrollment in virtual charter schools. This explains some but not all of the enrollment increases experienced by the charter school sector nationwide last year.

2020-21 CHANGE IN CHARTER SCHOOL AND DISTRICT SCHOOL ENROLLMENT BY STATE

STATE	CHARTER SCHOOL ENROLLMENT CHANGE	DISTRICT SCHOOL ENROLLMENT CHANGE	STATE	CHARTER SCHOOL ENROLLMENT CHANGE	DISTRICT SCHOOL ENROLLMENT CHANGE
Oklahoma	~ 77.7 %	▼ 6.9%	Rhode Island	▲ 6.5%	▼ 3.0%
Alabama	▲ 65.1%	• 1.4%	Minnesota	▲ 5.2%	▼ 2.9 %
ldaho	▲ 24.1 %	• 2.6%	Virginia	4.0%	• 3.5%
Oregon	~ 20.8%	• 5.5%	Colorado	▲ 3.9%	• 4.5%
Mississippi	▲ 19.9%	▼ 5.1%	Florida	▲ 3.9%	▼ 3.2%
Arkansas	▲ 19.2%	▼ 3.0%	Missouri	▲ 3.5%	▼ 0.1%
Washington	17.4%	▼ 4.2%	New Jersey	▲ 3.4 %	▼ 2.6%
South Carolina	17.1%	▼ 3.7%	Delaware	▲ 3.3%	▼ 2.4%
Alaska	▲ 16.6%	▼ 2.6%	Nevada	▲ 3.3%	~ 3.6%
Pennsylvania	▲ 15.5%	▼ 3.2%	Maryland	3.0%	• 3.1%
Wisconsin	▲ 13.8%	▼ 3.8%	Hawaii	~ 2.8%	• 3.0%
Ohio	▲ 11.1%	▼ 3.8%	California	▲ 2.3%	<mark>▼</mark> 3.2%
Indiana	▲ 10.5%	▼ 2.2%	Utah	▲ 2.1%	~ 0.5%
Georgia	▲ 9.0%	▼ 2.8%	Michigan	▲ 1.5%	▼ 4.7 %
Arizona	▲ 8.6 %	- 6 .1%	Massachusetts	▲ 1.3%	▼ 4.2%
Texas	▲ 8.6 %	▼ 2.9%	Connecticut	▲ 1.2%	▼ 2.9%
North Carolina	* 8.5 %	▼ 1.9%	District of Columbia	▲ 1.0%	~ 2.2%
New Hampshire	~ 7.5%	▼ 5.0%	Louisiana	▲ 0.2%	• 3.2%
New York	▲ 7.4%	▼ 3.6%	Illinois	▼ 1.1%	<mark>▼</mark> 3.6%
New Mexico	▲ 6.7%	▼ 4.9 %	Wyoming	▼ 3.5%	▼ 2.0%
Maine	▲ 6.6%	▼ 4.5%	lowa	▼ 6.8%	<mark>▼</mark> 2.1%
			TOTAL	▲ 7.1%	▼ 3.3%

Note: The states and territories where data was unavailable at the time of publication are: Guam, Kansas, Puerto Rico, and Tennessee. The National Alliance made earnest attempts to collect data from these states and territories. The following scenarios led to incomplete data: 2020-21 school level enrollment were not publicly available (Tennessee), data was redacted in a way that made our analysis impossible (Kansas), or we did not hear back from the state education agency (Guam and Puerto Rico). The National Alliance will update this report should data from these states become available.



Historical Significance

The unusually high rate of charter school growth during the first full year of the pandemic is particularly noteworthy because there were likely not more schools opening than normal, and perhaps fewer due to the pandemic. While we do not yet have school-opening data for the 2020-21 school year, the chart below shows that a few hundred new charter schools generally open each year. And new schools mean new students. Despite having potentially fewer new charter school options than they probably would have in a normal year, families maximized the available charter school seats.

During the 2020-21 school year, charter school student enrollment grew by 7%. Not since the 2014-15 school year when the number of charter schools grew by 4.6%, helping to create a 7.5% enrollment boost, have we seen numbers like this. Since that time, the rate of student enrollment continued to grow steadily, but at a slower pace each year. The higher the number of enrolled students, the more difficult it is to maintain the same rate of percentage growth year after year.

Then, when the reality of the pandemic set in, families voted with their feet during the 2020-20 school year and the percentage of students enrolled in charter schools is likely to have more than doubled.

SCHOOL YEAR	SOURCE	9 CHARTER STUDENTS	6 CHARTER STUDENT CHANGE	CHARTER SCHOOLS	% CHARTER SCHOOL CHANGE
2014-15	Federal	2,694,707	7.5%	6,814	4.6%
2015-16	Federal	2,859,956	6.1%	7,006	2.8%
2016-17	Federal	3,038,995	6.3%	7,206	2.8%
2017-18	Federal	3,170,094	4.3%	7,315	1.5%
2018-19	Federal	3,316,276	4.6%	7,530	2.9%
2019-20	State	3,350,783	-	7,680 ⁺	2.0%
2020-21	State	3,588,094	-	N/A	-

CHARTER SCHOOL STUDENT AND SCHOOL GROWTH

Data from school years 2014-15 through 2018-19 is based on federally recorded information. It includes all states where there are charter schools.

For the 2019-20 and 2020-21 school years, data reflects information from 42 states, including the District of Columbia. These data were provided or verified by state educational agencies and do not include information from all states.

^tCharter school count for 2019-20 is a preliminary count.





The data in this report show charter school enrollment grew in many different types of communities. In a handful of states, full-time virtual charter schools accounted for much of the year-over-year change. Oklahoma, for example, saw tremendous growth in virtual enrollment which resulted in the highest number of new charter school students in the nation – more than 35,000 students. Texas came in second place with slightly more than 29,000 students, but that growth was not due to full-time virtual schools.

In some of the nation's most mature charter sectors like Washington, D.C. and Louisiana, enrollment growth was modest. Yet other mature sectors like New York still experienced a significant percentage of increased enrollment. In the Pacific Northwest, both Washington and Oregon posted some of the largest gains in the country. What accounts for these differences? It's hard to say, because many factors likely contributed to the outcomes we see.

Last year, in partnership with Public Impact, we produced a <u>report</u> that provided an early look at how charter schools adapted to serve families and students during the early months of the pandemic. Perhaps some of the practices identified in that report—including prioritizing real-time learning, direct engagement, and regular check-ins with students—made charter schools appealing to the families of nearly 240,000 new students.

In this section, we take a deeper dive into several states: California, Arizona, Florida, Idaho, Washington, and one charter management organization: KIPP Public Schools, to better understand the stories behind the numbers.



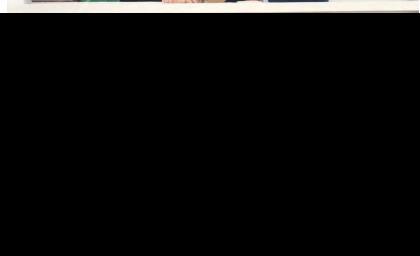
ARIZONA

Charter schools saw enrollment increases for nearly every racial and ethnic subgroup, while district schools saw enrollment decreases for nearly every racial and ethnic subgroup. Specifically, charter schools saw increases of Black and White students. District schools saw a particularly large decrease in the number of Black, White, and Asian students. Both sectors saw a large decrease in Native Hawaiian/Pacific Islander students. The large increases across the board resulted in a more than 8% increase in the percentage of public school students attending charter schools—making Arizona the first state (excluding the District of Columbia) to reach the milestone of having 20% of public school students enrolled in charter schools.

CALIFORNIA

Charter schools saw enrollment increases for nearly every racial and ethnic subgroup, while district public schools saw enrollment decreases for nearly every racial and ethnic subgroup. Specifically, charter schools saw particularly large increases of Asian, Filipino, Hispanic, and multi-racial students.





District public schools saw a particularly large decrease in White and Black students. Both sectors saw a large decrease in the number of Native American students.

FLORIDA

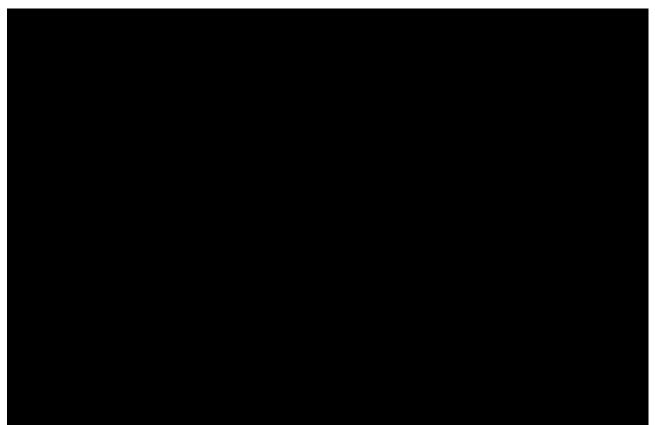
Any parent will agree that changing a child's school is no small decision. Imagine doing it for five children. That's exactly what Matt Mohler, Tallahassee father of five children under age 10, decided to do when he wanted something better for his kids' education.

After watching his elementary school-aged children struggle through a year of online schooling and feeling uncertain about whether the A-rated district school in his community would meet his children's needs, he was ready to explore other options available to his family. Matt heard about the new Tallahassee Classical Charter School that opened for the 2020-2021 school year, offering in-person instruction despite the pandemic. Even though the school is a 30-minute commute, he knew after talking to school leaders and teachers, that the curriculum and structure at Tallahassee Classical

> was exactly what he was looking for. Matt says, "The passion that the teachers at Tallahassee Classical have for not just the curriculum, but for the whole school, is inspiring. They are committed to not just teaching, but to a rich curriculum to build up the students' minds to seek truth and be good people." What's more, Matt said he was surprised to learn that within the first week of school, his children were beginning to study topics and books that he himself did not study until high school. "Within the first week, my [then] first grader came home reciting the Preamble of the Constitution. And I was blown away at the progress he was making in such a short amount of time."

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IDAHO

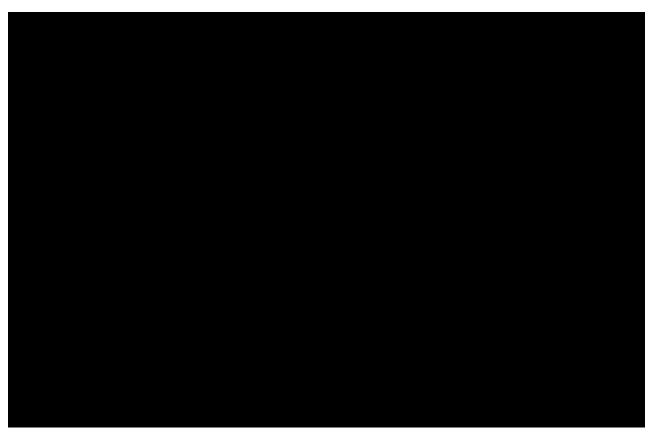
Their ability to offer in-person, online, and hybrid options made Gem Innovation Schools attractive to many Idaho families looking for options and stability during a time of upheaval and disorder. The dedicated teaching team at Gem, a successful network of brick-and-mortar schools and an online school, has a passion to provide students a transformational education, giving them the knowledge, characteristics, competencies, and mindsets for success in college and the next generation workplace. During the pandemic, rather than limiting learning options, Gem chose to expand to more grade levels to respond to parent demand and to better meet the needs of families. According to CEO Jason Bransford, families were also allowed to select the learning type one quarter at time. Since the state of the pandemic was rapidly evolving, families could truly customize their education as needs changed. Mr. Bransford says, "We had some excellent instructional strategies to build on, given that we had run an online school since 2004."

Mr. Bransford shares this feedback from a parent with several children at Gem Innovation, "The school is teaching my child to be self-sufficient and to take control of his learning. He's held accountable for meeting his responsibilities. He's really being prepared for his future. I have younger kids in this school as well, and I love that they are all being taught these important life skills."

WASHINGTON

Founded on the pillars of Collaborative Community, Anti-Racism, and Leadership, Seattle's Rainier Valley Leadership Academy (RVLA) is rapidly growing. RVLA's diverse team of educators—81.5% of teachers are people of color—and staff were able to make quick pivots during the pandemic to serve the community. Principal and CEO Baionne Coleman says enrollment has increased 23% over last year. Principal Coleman relays an anecdote of a parent who had a child at RVLA and two children in a local district school. That parent moved their other children to RVLA in 2020 because of the above and beyond communication, academic supports, and emphasis on mental health for scholars and families.





English Language Learner Coordinator Erica Carmichael believes RVLA's families were pleased with the school's response to the pandemic, including implementing a hybrid model of learning. Ms. Carmichael says, "Multilingual families are attracted to charter schools in general because the school and class sizes are relatively smaller than district school systems. Our multilingual families appreciate the support and care we have for one another. This can be seen by our constant communication to families and an inviting environment in a caring community. Incorporating culture months, pep rallies, and diverse speakers throughout the school year aligns with our curriculum and grading policies."

NATIONAL

KIPP Public Schools is a non-profit network of 270 charter schools serving more than 120,000 students in grades PreK-12. All KIPP schools share a common approach, although every school is unique. Like many schools, KIPP schools were uncertain about how the pandemic would impact enrollment, particularly since spring and summer are still enrollment months and traditional communication methods of in-person canvassing, open houses, and other events were not an option.

Even under these unusual circumstances, many families were drawn to—or stayed with—KIPP Public Schools. KIPP schools saw higher than normal retention of existing students and also saw an uptick in enrollment in some schools due to unique student and family supports related to the pandemic such as 1:1 technology to support virtual learning; meal delivery; and 1:1 family outreach—including virtual college and career counseling.

For example, in March 2020, the KIPP Forward (formerly KIPP Through College) team in Nashville was already in crisis response mode, supporting families recovering from the deadly tornadoes that had hit their region. When schools began shutting down due to COVID-19, the team had to urgently pivot again. According to Loretta McDonald, Dean of College Counseling, and Chaelsa Williams-McKay, Director of KIPP Forward, their team was able to switch to all-virtual meetings within days of the pandemic being declared and extend deadlines to meet students' needs. KIPP Forward



counselors consulted skilled researchers to find out how colleges were dealing with admissions and financial aid during the national shelter-in-place. Their college and career counseling work, which usually slows down in June, now took over the entire summer. "The team would not give up," says Williams-McKay. "They tried different strategies with students over and over again. It was not a one-sizefits-all strategy."

Conclusion

Data collected by the National Alliance reveal an interesting and important shift: despite declines in overall public school enrollment during the first full school year of the COVID-19 pandemic, public charter schools saw state-level enrollment increases in nearly every state examined in this paper. These data are yet another indication of the importance parents place on the ability to choose the right school for their children, particularly during the pandemic. It is clear from this data and prior research⁶ that millions of additional families are interested in charter schools and would select one if it were available. Indeed, a compelling case can be made that the future growth of public schools in America will be enabled by charter schools.

Families want more, not fewer, public school choices. They voted with their feet this past year, and they will surely vote at the polls. Federal, state, and local policymakers who oppose charter schools are out of touch with their stakeholders and constituents. Thankfully, many leaders across the country are listening to their constituents. While the pandemic raged on and charter enrollment grew, the country witnessed the biggest wave of legislation favorable to charter schools in more than a decade. In states from Rhode Island to California, elected officials withdrew bills harmful to charter schools in state legislatures. In Wyoming, West Virginia, Oklahoma, and Iowa, state legislatures strengthened charter laws and/or created a better environment in which charter schools can thrive.

TABLE 1: CHARTER SCHOOL AND DISTRICT SCHOOL ENROLLMENT2019-20 SY TO 2020-21 SY

2019-20 31	10 2020-21	31						
STATE	2019-20 CHARTER SCHOOL ENROLLMENT	2019-20 DISTRICT SCHOOL ENROLLMENT	2020-21 CHARTER SCHOOL ENROLLMENT	2020-21 DISTRICT SCHOOL ENROLLMENT	CHARTER SCHOOL CHANGE	DISTRICT SCHOOL CHANGE	% CHARTER SCHOOL CHANGE	% DISTRICT SCHOOL CHANGE
Alabama	1,115	747,267	1,841	736,899	726	-10,368	65.11%	-1.39%
Alaska	6,866	125,711	8,006	122,388	1,140	-3,323	16.60%	-2.64%
Arizona	213,820	936,986	232,249	880,007	18,429	-56,979	8.62%	-6.08%
Arkansas	35,115	444,317	41,849	431,155	6,734	-13,162	19.18%	-2.96%
California	675,374	5,487,627	690,657	5,311,866	15,283	-175,761	2.26%	-3.20%
Colorado	127,213	786,010	132,215	750,984	5,002	-35,026	3.93%	-4.46%
Connecticut	10,806	512,857	10,940	498,122	134	-14,735	1.24%	-2.87%
D.C.	43,518	51,037	43,942	49,890	424	-1,147	0.97%	-2.25%
Delaware	16,366	124,485	16,910	121,513	544	-2,972	3.32%	-2.39%
Florida	329,219	2,529,733	341,926	2,449,761	12,707	-79,972	3.86%	-3.16%
Georgia	77,318	1,692,303	84,291	1,645,675	6,973	-46,628	9.02%	-2.76%
Hawaii	11,877	167,454	12,213	162,491	336	-4,963	2.83%	-2.96%
Idaho	25,364	286,627	31,472	279,133	6,108	-7,494	24.08%	-2.61%
Illinois	63,462	1,865,460	62,760	1,798,654	-702	-66,806	-1.11%	-3.58%
Indiana	44,965	1,006,446	49,686	984,278	4,721	-22,168	10.50%	-2.20%
lowa	132	517,189	123	506,533	-9	-10,656	-6.82%	-2.06%
Louisiana	87,506	632,306	87,670	611,955	164	-20,351	0.19%	-3.22%
Maine	2,497	177,839	2,662	169,812	165	-8,027	6.61%	-4.51%
Maryland	22,680	886,734	23,366	859,172	686	-27,562	3.02%	-3.11%
Massachusetts	47,978	900,850	48,578	862,887	600	-37,963	1.25%	-4.21%
Michigan	147,339	1,352,213	149,478	1,288,134	2,139	-64,079	1.45%	-4.74%
Minnesota	62,751	830,452	65,987	806,096	3,236	-24,356	5.16%	-2.93%
Mississippi	2,128	463,785	2,551	440,076	423	-23,709	19.88%	-5.11%
Missouri	24,213	893,197	25,068	892,051	855	-1,146	3.53%	-0.13%
Nevada	56,999	443,861	58,855	427,778	1,856	-16,083	3.26%	-3.62%
New Hampshire	4,228	171,940	4,545	163,364	317	-8,576	7.50%	-4.99%
New Jersey	55,604	1,320,225	57,480	1,285,960	1,876	-34,265	3.37%	-2.60%
New Mexico	27,147	295,882	28,968	281,237	1,821	-14,645	6.71%	-4.95%
New York	159,214	2,479,735	170,933	2,390,497	11,719	-89,238	7.36%	-3.60%
North Carolina	116,316	1,409,828	126,165	1,383,055	9,849	-26,773	8.47%	-1.90%
Ohio	107,601	1,684,454	119,565	1,619,821	11,964	-64,633	11.12%	-3.84%
Oklahoma	45,988	657,662	81,739	612,374	35,751	-45,288	77.74%	-6.89%
Oregon	38,310	544,351	46,273	514,644	7,963	-29,707	20.79%	-5.46%
Pennsylvania	146,556	1,627,193	169,252	1,575,473	22,696	-51,720	15.49%	-3.18%
Rhode Island	9,904	143,557	10,547	139,184	643	-4,373	6.49%	-3.05%
South Carolina	39,097	743,218	45,774	715,516	6,677	-27,702	17.08%	-3.73%
Texas	336,900	5,157,026	365,930	5,005,633	29,030	-151,393	8.62%	-2.94%
Utah	77,582	589,276	79,179	586,127	1,597	-3,149	2.06%	-0.53%
Virginia	1,218	1,296,794	1,267	1,251,489	49	-45,305	4.02%	-3.49%
Washington	3,163	1,137,945	3,712	1,090,618	549	-47,327	17.36%	-4.16%
Wisconsin	44,703	810,256	50,861	779,074	6,158	-31,182	13.78%	-3.85%
Wyoming	631	93,201	609	91,329	-22	-1,872	-3.49%	-2.01%
Total	3,350,783	44,025,289	3,588,094	42,572,705	237,311	-1,452,584	7.08%	-3.30%

TABLE 2: CALIFORNIA ENROLLMENT CHANGES FOR RACIAL AND ETHNIC GROUPS2019-20 SY TO 2020-21 SY

STATE	2019-20 CHARTER SCHOOL ENROLLMENT	2019-20 DISTRICT SCHOOL ENROLLMENT	2020-21 CHARTER SCHOOL ENROLLMENT	2020-21 DISTRICT SCHOOL ENROLLMENT	CHARTER SCHOOL CHANGE	DISTRICT SCHOOL CHANGE	% CHARTER SCHOOL CHANGE	% DISTRICT SCHOOL CHANGE
African American	49,811	274,685	49,859	259,968	48	-14,717	0.10%	-5.36%
American Indian or Alaska Native	3,593	26,689	3,407	24,924	-186	-1,765	-5.18%	-6.61%
Asian	32,976	542,091	34,228	538,223	1,252	-3,868	3.80%	-0.71%
Filipino	10,457	136,044	11,055	131,590	598	-4,454	5.72%	-3.27%
Hispanic or Latino	352,306	3,028,892	361,695	2,958,605	9,389	-70,287	2.67%	-2.32%
Not Reported	9,317	43,836	10,106	40,946	789	-2,890	8.47%	-6.59%
Pacific Islander	2,283	24,912	2,290	23,950	7	-962	0.31%	-3.86%
Two or More Races	31,190	212,182	32,431	214,283	1,241	2,101	3.98%	0.99%
White	183,441	1,198,296	185,586	1,119,377	2,145	-78,919	1.17%	-6.59%
Total	675,374	5,487,627	690,657	5,311,866	15,283	-175,761	2.26%	-3.20%

TABLE 3: ARIZONA ENROLLMENT CHANGES FOR RACIAL AND ETHNIC GROUPS 2019-20 SY TO 2020-21 SY

	2019-20	2019-20	2020-21	2020-21	CHARTER	DISTRICT	% CHARTER	% DISTRICT
STATE	CHARTER SCHOOL ENROLLMENT	DISTRICT SCHOOL ENROLLMENT	CHARTER SCHOOL ENROLLMENT	DISTRICT SCHOOL ENROLLMENT	SCHOOL	SCHOOL	SCHOOL CHANGE	SCHOOL
Asian	11,998	21,123	12,339	18,961	341	-2,162	2.84%	-10.24%
American Indian/ Alaska Native	4,274	44,820	4,420	41,247	146	-3,573	3.42%	-7.97%
Black/African American	12,617	49,136	13,578	44,114	961	-5,022	7.62%	-10.22%
Hispanic/Latino	85,290	437,171	89,520	415,786	4,230	-21,385	4.96%	-4.89%
White	88,089	345,675	96,730	315,534	8,641	-30,141	9.81%	-8.72%
Native Hawaiian/ Pacific Islander	767	3,160	677	2,626	-90	-534	-11.73%	-16.90%
Multiple Races	10,740	35,771	14,966	42,051	4,226	6,280	39.35%	17.56%
Missing Ethnicity			19	39	19	39		
Total	213,775	936,856	232,249	880,358	18,474	-56,498	8.64%	-6.03%

Note: The National Alliance used the "Annual Enrollment Reports – Type by Ethnicity" tab to inform this table. In the "Type by Ethnicity" tab there appears to be some data suppression / anomalies. To arrive at figures presented in this table, the National Alliance executed the following steps. First, we accepted charter figures for the subgroups provided and subtracted these figures from the "Arizona Total" figure provided for each subgroup to arrive at a non-charter enrollment figure for each subgroup. Second, the totals provided at the bottom of this table are simply a sum of all subgroup enrollment by year by sector. The figures presented in the "Total" row in this table vary slightly from Arizona's statewide totals.



Methodology

In July and August 2021, the National Alliance examined state educational agency (SEA) websites and contacted SEA officials to identify enrollment data for charter schools compared to other public, non-charter schools. As of the writing of this report, 42 states have been identified where there was data from the SEA to make a clear determination about the total statewide enrollment figures for charter schools compared to district public schools during the 2019-20 and 2020-21 school years. Below are some important notes regarding the calculation of figures contained in this report.

- Sourcing. For each state, the source of the data, date the data was accessed, and any relevant notes regarding how statewide figures were calculated are provided below. In this report, for the purposes of reliability and consistency, figures provided by SEAs were used.
- Fall Counts Preferred. Processes for counting students vary from state to state. However, most states have a fall or October count, and this is the preferred count figure in instances where there were either spring or monthly counts. There are instances in the report where a yearly count or Spring count is used.
- District Public School Enrollment Figures. In many instances, the National Alliance performed simple calculations to arrive at totals for public charter schools compared to all other public schools in the state (district public schools). Generally speaking, the calculations started with statewide public school enrollment totals, subtracted total charter school enrollment, and arrived at district school figures for each year. More details on the calculation methods can be found in the endnotes.
- Cautionary Note. As mentioned above, enrollment figures are calculated in many different ways. As such, other researchers, media outlets, and individuals may arrive at slightly different numbers based upon calculation methods. The National Alliance's goal was to 1) source data from publicly available sources and make the sourcing transparent and 2) keep calculation methods simple so they could be reliable and easily understood.

DATA SOURCES BY STATE

Alabama: "Data Request to the Alabama State Department of Education", Alabama State Department of Education, received August 30, 2021, personal e-mail communication. The author submitted a data request to the Alabama State Department of Education. ALSDE officials responded with charter enrollment data for 2019-20 and 2020-21. ALSDE also provided statewide public enrollment figures - the author subtracted charter enrollment from these figures to arrive at statewide non-charter public enrollment totals.

Alaska: "School Enrollment Totals for all Alaskan Schools", Alaska Department of Education and Early Development, accessed August 30, 2021, <u>https://education.alaska.gov/data-center</u>. The author contacted officials at the Alaska Department of Education and Early Development for clear and reliable lists of Alaska charter schools in 2019-20 and 2020-21. ADEED officials responded on August 30, 2021 with this information. Using this information, the author was able to download school-level enrollment data, tag charter schools, and parse charter enrollment from all other non-charter public enrollment.



Arizona: Arizona Department of Education "Annual Enrollment Reports - Type by Grade Tab." Accessed on July 14, 2021. Website: https://www.azed.gov/accountability-research/data/. Files provide statewide enrollment as well as enrollment by school type and level. Here we include the provided figures for charter schools and subtract the charter figures from the Arizona total enrollment to arrive at a non-charter public figure. These reports include the number of students enrolled on the October 1 reporting date. Note: in the "Type by Grade" tab there appears to be some data suppression / anomalies. The National Alliance accepted the charter figures as is from this source. To arrive "non-charter" figures, the National Alliance took the "Arizona Total" figure for each year in the "Type by Grade" tab and subtracted charter enrollment to arrive at statewide public non-charter enrollment.

Arkansas: "Data Request to the Arkansas Department of Education", Arkansas Department of Education, received August 30, 2021, personal e-mail communication. The author submitted a data request to the Arkansas Department of Education. ADE officials sent school-level enrollment totals for all Arkansas public schools and a list of AR charter schools for both 2019-20 and 2020-21. Using this information, the author was able to calculate charter and non-charter public totals.

California: Enrollment by Subgroup for Charter and Non-Charter Schools", California Department of Education Data Quest, accessed July 14, 2021, <u>https://dq.cde.ca.gov/dataquest/dqcensus/EnrCharterSub.</u> <u>aspx?cds=00&agglevel=state&year=2019-20&ro=y&ro=y</u>. This report displays the annual K-12 public school enrollment by student subgroup for charter schools and district public schools for the selected report level (state, county, district, or school) and year. Annual enrollment consists of the number of students enrolled on Census Day (the first Wednesday in October).

Colorado: "Colorado Education Facts and Figures" (total public student enrollment) and "Charter School Enrollment" (for charter enrollment), Colorado Department of Education, accessed July 14, 2021. Public student enrollment: https://www.cde.state.co.us/communications/coeducationfactsandfigures; charter school enrollment: https://www.cde.state.co.us/cdechart/chartenroll.asp. To determine district public school enrollment, the author took total statewide public enrollment and subtracted charter enrollment.

Connecticut: "Public School Enrollment Trends by Year", Connecticut Department of Education, accessed on August 5, 2021, <u>http://edsight.ct.gov/SASPortal/main.do</u>. Enrollment files for Connecticut do not have a charter flag, however, it appears that charter schools have a district code that begins with "26, 27, 28, or 29". Using this assumption, which was confirmed by Connecticut partners, the author was able to calculate charter enrollment totals compared to non-charter public enrollment totals.

Delaware: "Annual Student Enrollment and Unit Allotment Reports," Delaware Department of Education, accessed July 15, 2021, <u>https://www.doe.k12.de.us/Page/1495</u>. District public school and charter school summaries were used to calculate enrollment figures. The author combined regular education and special education totals in enrollment reports to arrive at total figure for each sector in each year. Statewide totals include Dover Air Force Base.

District of Columbia: "School Year Enrollment Audit Report Data", District of Columbia Office of the State Superintendent of Education, accessed July 15, 2021, <u>https://osse.dc.gov/page/data-and-reports-</u><u>O#enrollment</u>. Data files provide both a charter school and district public school breakout. Audited public enrollment figures from fall count data were used in this calculation.

Florida: "Survey 2: Fall Students Enrolled by Charter Status," Florida Department of Education EdStats Data



Portal, accessed July 14, 2021, <u>edstats.fldoe.org</u>. Obtained state-level information for "Survey 2: Fall 2020" to examine total statewide enrollment in charter schools versus district public schools. Spring count is also available but used fall counts since most states have fall counts available.

Georgia: "Georgia Charter Schools Annual Report" (for charter school figures) and "Student Enrollment by Grade Level (PK-12)" (for total statewide public enrollment, Georgia Department of Education, accessed July 14, 2021. Charter school data: <u>https://www.gadoe.org/External-Affairs-and-Policy/Charter-Schools/</u> <u>Pages/Annual-Reports.aspx</u>; total statewide enrollment: <u>https://oraapp.doe.k12.ga.us/ows-bin/owa/fte_</u> <u>pack_enrollgrade.entry_form</u>. Georgia does not have robust charter flag in its statewide datasets. As such, the author pulled total public enrollment figures, consulted charter school annual reports for total charter school enrollment totals, and subtracted charter school figures from total statewide figures to get to a district public school figure. October count data was used.

Hawaii: Annual enrollment press releases with downloadable statewide enrollment files, Hawaii State Department of Education, accessed July 15, 2021. 2019-20 data: <u>https://www.hawaiipublicschools.org/</u> <u>ConnectWithUs/MediaRoom/PressReleases/Pages/2019-20-enrollment.aspx</u>; 2020-21 data: <u>https://www. hawaiipublicschools.org/ConnectWithUs/MediaRoom/PressReleases/Pages/2020-21-enrollment.aspx</u>. Data files for each year contain charter school and district public school breakouts.

Idaho: "Historical State by Grade Enrollment" (for statewide public totals) and "Charter School Historical Enrollment by Year" (for charter totals), Idaho State Department of Education, accessed July 15, 2021, https://www.sde.idaho.gov/finance/#attendance. The author used statewide enrollment totals to calculate non-charter public figures.

Illinois: "Students Housed by Serving School: School Summary," Illinois State Board of Education, accessed August 5, 2021, <u>https://www.isbe.net/Pages/Fall-Enrollment-Counts.aspx</u>. The National Alliance contacted the ISBE for assistance in determining which Illinois schools are charter schools. ISBE representatives shared enrollment files for 2020-2021 that provide comparable student enrollment data to 2019-2020 enrollment data available on the ISBE website. In addition, ISBE let the National Alliance know of appropriate flags in the dataset to surmise all public schools and charter schools. The National Alliance used this information to determine total charter enrollments as compared to non-charter public enrollment.

Indiana: "Data Request to the Indiana Department of Education," Indiana Department of Education, received August 30, 2021, personal e-mail communication. The author submitted a data request to the Indiana Department of Education. IDOE officials sent summary statewide statistics for charter and all other public non-charter enrollment directly to the author.

lowa: "2019-2020 and 2020-2021 lowa Public School Building PreK-12 Enrollments by School, Grade, Race and Gender" and "lowa Charter Schools Webpage", lowa Department of Education, accessed August 31, 2021, <u>https://educateiowa.gov/data-reporting/education-statistics#Student_Demographic_Information</u> and <u>https://educateiowa.gov/pk-12/options-educational-choice/charter-schools</u>. The author was able to identify the two charter schools in Iowa in 2019-20 and 2020-21. Using statewide public enrollment information, the author calculated charter and public non-charter enrollment totals.

Louisiana: "October Multi Stats", Louisiana Department of Education, accessed on July 14, 2021, <u>https://www.louisianabelieves.com/resources/library/student-attributes</u>. Pulled October (fall) counts for each year. Leveraged the "charter type" flag in the data to calculate a total for charters/ non-charters. Identified



charter schools as any school that had a flag of Type 1-Type 5 (six total classifications).

Maine: "Public Funded Attending Counts by School and Grade" and "School Enrollment Statistics", Maine Department of Education and Maine Charter School Commission, accessed August 30, 2021, <u>https://www.maine.gov/doe/data-reporting/reporting/warehouse/enrollment</u> and through email correspondence. The author contacted the Maine Charter School Commission to obtain charter school enrollment figures for 2019-20 and 2020-21. The author subtracted charter enrollment figures from statewide public enrollment totals to arrive at non-charter public figures for 2019-20 and 2020-21.

Maryland: "Data Request to the Maryland State Department of Education", Maryland State Department of Education, received on September 9, 2021, personal e-mail communication. The National Alliance submitted a data request to the Maryland State Department of Education requesting charter and non-charter enrollment totals at the school-level for 2019-20 and 2020-21. MSDE officials provided this information directly to the National Alliance.

Massachusetts: "Enrollment Data School/Grade" (for total public enrollment) and "Charter School Fact Sheet, Directory, and Application History" (for charter school enrollment totals), Massachusetts Department of Education, accessed July 15, 2021. Total public enrollment: <u>https://www.doe.mass.edu/infoservices/</u> <u>reports/enroll/default.html?yr=1920</u>; charter school enrollment: <u>https://www.doe.mass.edu/charter/factsheet.</u> <u>html</u>. The author calculated statewide district public school enrollment by subtracting charter school enrollment from statewide public school totals.

Michigan: "Student Count Enrollment Files" Michigan Department of Education Michigan School Data Portal, accessed July 15, 2021, <u>https://www.mischooldata.org/k-12-data-files</u>. Files contain a code for charter schools, which are called public school academies in Michigan. Total enrollment figures were calculated for public school academies, and this figure was then subtracted from statewide total enrollment to derive district public school figures.

Minnesota: "State/District/School/County Enrollment," Minnesota Department of Education, accessed July 14, 2021, <u>https://public.education.mn.gov/MDEAnalytics/DataTopic.jsp?TOPICID=2</u> Per the Minnesota Department of Education, charter schools are categorized as a Type 07 district (<u>https://public.education.mn.gov/MDEAnalytics/Summary.jsp</u>). Using annual enrollment files, totals were calculated for all Type 07 districts (charter schools) and subtracted from statewide public school total to get district public school figures.

Mississippi: "Enrollment by Grade", Mississippi Department of Education via Mississippi First, accessed August 17, 2021, <u>https://newreports.mdek12.org/</u>. The National Alliance worked with Mississippi First to identify an enrollment data source and a list of charter schools in Mississippi. Charter schools included in the analysis are: Ambition Prep, Clarksdale Collegiate, Joel E. Smilow Collegiate, Midtown Public Charter School, Reimagine Prep, and Smilow Prep. No data existed for Leflore Legacy Academy at the time of the analysis. The author was able to identify enrollment totals for each of the schools listed and subtracted charter enrollment from total public enrollment to arrive at non-charter public enrollment for Mississippi.

Missouri: "Building Enrollment 1991-20", Missouri Department of Elementary and Secondary Education, accessed August 30, 2021, <u>https://apps.dese.mo.gov/MCDS/home.aspx?categoryid=1&view=2</u>. Officials from the Missouri Charter Schools Association assisted the author in identifying charter schools in Missouri. The author then coded charter schools in the dataset, calculated a charter total for 2019-20 and 2020-21



and subtracted the charter total for overall statewide public totals to arrive at public, non-charter totals.

Nevada: "Enrollment for Nevada Public Schools", Nevada Department of Education via Opportunity 180, accessed on August 5, 2021, <u>https://doe.nv.gov/DataCenter/Enrollment/</u>. Staff at Opportunity 180 assisted the National Alliance in determining which Nevada schools are charter schools. Nevada has both state sponsored charters and LEA sponsored charters. Both sets of charters are included in the charter total for the purposes of this analysis.

New Hampshire: "State Totals: Fall Enrollments by Grade," New Hampshire Department of Education, accessed July 15, 2021, <u>https://www.education.nh.gov/who-we-are/division-of-educator-and-analytic-resources/bureau-of-education-statistics/state-totals</u>. Data files contain a charter school breakout figure. Author calculated district public school enrollment using statewide public school totals.

New Jersey: "Fall Enrollment Reports," New Jersey Department of Education, accessed July 15, 2021, <u>https://www.nj.gov/education/doedata/enr/index.shtml</u>. Data files separate charter schools from other LEAs. Author took charter school totals and subtracted from statewide public school enrollment to arrive at district public school figures.

New Mexico: "Annual Report to the First Session of the Fifty-Fifth Legislature and Data Reference Guide, January 2021", State of New Mexico Legislative Education Study Committee, accessed August 5, 2021, <u>https://www.nmlegis.gov/Entity/LESC/Documents/Reports_To_The_Legislature/</u> <u>LESCReportToLegislature_2021.pdf</u>. Figures in the data reference guide provide a clean breakout between public charters and non-charter public schools. Report also includes trend data.

New York: "Public School Enrollment School Enrollment: All Students," New York State Department of Education Information and Reporting Services, accessed July 14, 2021, <u>http://www.p12.nysed.gov/irs/statistics/enroll-n-staff/home.html</u>. Per the New York State Department of Education, 2019-20 data is considered final and 2020-21 data is considered preliminary.

North Carolina: "2019 Charter Schools Annual Report" and "2020 Charter Schools Annual Report", North Carolina State Board of Education and North Carolina Department of Public Instruction, accessed August 31, 2021, https://ncleg.gov/documentsites/committees/JLEOC/Reports%20Received/2021%20Reports%20 Received/Annual%20Charter%20Schools%20Report.pdf and https://files.nc.gov/dpi/documents/ charterschools/resources/report-charter-schools-annual-report-2.15.2020.pdf. The author contacted the NC Department of Public Instruction and officials provided this resource for charter school enrollment. Each annual report contains a Fall count of charter enrollment and a total statewide public count. The author subtracted the charter enrollment count from the public statewide total to arrive at non-charter public figures.

Ohio: "Fall Enrollment Headcount: October Public District and Buildings," Ohio Department of Education, accessed July 14, 2021, <u>http://education.ohio.gov/Topics/Data/Frequently-Requested-Data/Enrollment-Data</u>. Data files do not provide a total figure, so the author summed male and female student data to arrive at a total for both charter schools and district public schools.

Oklahoma: "State Public Enrollment Totals: School Site Totals," Oklahoma State Department of Education, accessed July 15, 2021, <u>https://sde.ok.gov/documents/2014-02-13/state-student-public-enrollment-2013</u>. Data files include charter school specific data, and the author calculated district public school figures by



subtracting charter school enrollment from total statewide public school enrollment. It is worth noting that some Oklahoma virtual charter schools saw large enrollment spikes from 2019-20 to 2020-21.

Oregon: "Fall Membership Enrollment Report 2020-21", Oregon Department of Education via data request, received August 31, 2021, <u>https://www.oregon.gov/ode/reports-and-data/students/Pages/Student-Enrollment-Reports.aspx</u>. The author reached out to officials in the Oregon Department of Education for enrollment figures and assistance in determining which Oregon schools are charter schools. ODE provided the National Alliance with a file containing charter data breakouts for both 2019-20 and 2020-21. This file also contained public statewide totals. The author subtracted charter enrollment totals from statewide public enrollment figures to arrive at non-charter public totals.

Pennsylvania: "Public School Enrollment Report," Pennsylvania Department of Education, accessed July 14, 2021, <u>https://www.education.pa.gov/DataAndReporting/Enrollment/Pages/PublicSchEnrReports.aspx</u>. Enrollment data files for Pennsylvania contain a flag for charter schools. The author calculated a district public school figure by subtracting the charter school total from statewide total in each year.

Rhode Island: "Data Request to the Rhode Island Department of Education", Rhode Island Department of Education, received on August 31, 2021, personal e-mail communication. The National Alliance submitted a data request to the Rhode Island Department of Education requesting charter and non-charter enrollment totals at the school-level for 2019-20 and 2020-21. RIDE officials provided this information directly the National Alliance staff members.

South Carolina: "180 Day Active Headcount for 2019-20 and 2020-21" and "Data Request to Public Charter School Alliance of South Carolina", South Carolina Department of Education and personal e-mail communication, received/accessed September 8, 2021, <u>https://ed.sc.gov/data/other/student-counts/active-student-headcounts</u>. National Alliance staff worked with staff at the Public Charter School Alliance of South Carolina to identify open charter schools during the 2019-20 and 2020-21 school years. Using these lists, National Alliance staff were able to calculate charter enrollment and public non-charter enrollment from data files available on the SCDOE website.

Texas: "Texas Education Agency PEIMS Standard Reports Student Enrollment Report "Statewide District Totals by Gender", Texas Education Agency, accessed on July 14, 2021, <u>https://rptsvr1.tea.texas.gov/</u> <u>adhocrpt/adste.html</u>. Student enrollment by gender files were selected to minimize data suppression to get the most accurate count of charter and non-charter students in the state of Texas. In addition, more granular files in Texas have a charter flag whereas statewide total files do not. Minor suppression in data two campuses in 2020-21 data, one campus in 2019-20 data.

Utah: "Fall Enrollment by Demographics and Grade Levels," Utah State Board of Education, accessed July 14, 2021, <u>https://schools.utah.gov/data/reports?mid=1424&tid=4</u>.

Virginia: "Data Request to the Virginia Department of Education", Virginia Department of Education, received August 30, 2021, personal e-mail communication. The author submitted a data request to the Virginia Department of Education. VDE officials responded with a data file containing school-level enrollments for charter schools and all other non-charter public schools in Virginia for 2019-20 and 2020-21.

Washington: "Washington State Report Card" and The Washington State Board of Education "Charter



Public Schools Home Page", Washington Office of Superintendent of Public Instruction, accessed August 5, 2021, <u>https://washingtonstatereportcard.ospi.k12.wa.us/ReportCard/ViewSchoolOrDistrict/103300</u> and <u>https://www.sbe.wa.gov/our-work/charter-public-schools#List%20of%20certified%20schools</u>. In order to determine charter figures, the author consulted with the Washington State Board of Education website for a list of charters. In 2019-20, there were 10 total charters - 9 authorized by the State Commission and one authorized by Spokane Public Schools. In 2020-21, there were 12 total charters - 10 authorized by the State Commission and two authorized by Spokane Public Schools. The author used the school lists to create a charter total for both years. Then, the charter figure was deducted from statewide public enrollment totals to arrive at non-charter public totals.

Wisconsin: "WISEdash Public Portal Enrollment Data" (for total public school enrollment) and "Wisconsin Charter Schools Quick Facts" (for total charter school enrollment), Wisconsin Department of Public Instruction, accessed July 15, 2021. Total public enrollment: <u>https://wisedash.dpi.wi.gov/Dashboard/dashboard/18110</u>; total charter school enrollment: <u>https://dpi.wi.gov/sites/default/files/imce/parental-education-options/Charter-Schools/pdf/Wisconsin_Charter_Schools_Quick_Facts_Updated.pdf</u>. The author used statewide public school totals to calculate a public charter school figure.

Wyoming: "Fall Enrollment Summary by School by Grade" and "Wyoming Charter Schools List", Wyoming Department of Education, accessed August 31, 2021, <u>https://edu.wyoming.gov/data/</u> statisticalreportseries-2/ and <u>https://edu.wyoming.gov/for-district-leadership/school-programs/charterschools/</u>. Using the National Alliance list of schools from 2018-19 and a current list of Wyoming charter schools listed on the WDE website, the author was able to identify the five Wyoming charter schools and campuses that were open in 2019-20 and 2020-21. Using this information along statewide public enrollment figures, the author calculated charter enrollment totals and statewide non-charter public enrollment totals.



Endnotes

1 National Parents Union. "National Parents Union Survey of Public School Parents – April 2021." May 4, 2021. Website: https://nationalparentsunion.org/npu-polling/.

2 David Crary. "Sparked by Pandemic Fallout, Homeschooling Surges Across US,", Associated Press, July 26, 2021, <u>https://apnews.com/article/health-religion-coronavirus-pandemic-race-and-ethnicity-5385d17b9f91591f4baae71bafb71f0c.</u>

3 Kevin Mahnken, "New Federal Data Confirms Pandemic's Blow to K-12 Enrollment, With Drop of 1.5 Million Students; Pre-K Experiences 22 Percent Decline," The 74 , June 28, 2021, <u>https://www.the74million.org/article/public-school-enrollment-down-3-percent-worst-century/</u>.

4 Eesha Pendharkar, "More Than 1 Million Students Didn't Enroll During the Pandemic. Will They Come Back?," Education Week, June 17, 2021, <u>https://www.edweek.org/leadership/more-than-1-million-students-didnt-enroll-during-the-pandemic-will-theycome-back/2021/06</u>.

5 Marlene Sokol, "Tampa Bay charter schools are growing during the coronavirus pandemic." Tampa Bay Times, December 10, 2020, <u>https://www.tampabay.com/news/education/2020/12/10/tampa-bay-charter-schools-are-growing-during-the-coronavirus-pandemic/.</u>

Kristine Sorensen, "COVID-19 In Pennsylvania: Enrollment At Cyber Charter Schools Up Nearly 60 Percent." CBS, Pittsburgh, KDKA, December 21, 2020, <u>https://pittsburgh.cbslocal.com/2020/12/21/pennsylvania-enrollment-at-cyber-charter-schools-up-nearly-60-percent/</u>.

Devin Bodkin, "Charter schools added thousands while statewide enrollment dropped. Idaho Ed News, January 20, 2021, <u>https://www.idahoednews.org/top-news/charter-schools-added-thousands-of-students-while-statewide-enrollment-dropped/</u>.

Michael Elsen-Rooney, "NYC charter school enrollment continues to steadily grow amid COVID pandemic" New York Daily News, February 2, 2021, <u>https://www.nydailynews.com/new-york/education/ny-nyc-covid-charter-school-enrollment-grows-20210202-sl6g-jmc72rfppfllhd2b4ibmxu-story.html</u>.

6 Demanding a Chance: Parents' Demand for Charter Schools Continues to Grow," National Alliance for Public Charter Schools. April 28, 2016, <u>https://www.publiccharters.org/publications/demanding-chance-parents-demand-charter-schools-continues-grow</u>.

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Evaluation Rubric

Authorizer Name:

Date:

SUMMARY	RATING
Category I. Authorizer Commitment & Capacity	
1. Human Resources	
2. Financial Resources	
Category II. The Petition Process	
3. Petition Application	
4. Petition Review	
5. Petition Decisions	
Category III. Performance Contracting	
6. Pre-Opening Period	
7. Performance Standards	
8. Contract Terms	
9. Authorizer Obligations	
Category IV. Oversight and Evaluation	
10. Compliance Monitoring	
11. Intervention	
12. Upholds Charter School Autonomy	
Category V. Renewal and Termination	
13. Renewal Process	
14. Renewal Decisions	
15. Closure/Termination	
OVERALL RATING	

OVERALL RATING CRITERIA	
Rating	Criteria
Needs Improvement (NI)	Earned a majority NI (8 or more) across all standards
Adequate (A)	Earned any combination of ratings across standards expect as designated for NI or E
Exemplary (E)	Earned a majority E (8 or more) and no NI across all standards

Category I. Authorizer Commitment & Capacity

Standard 1. Human Resources. The authorizer establishes a dedicated charter office, with the appropriate personnel to carry out its authorizing obligations.

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Appropriate staffing levels based on number of schools in portfolio. Best practice specifies one employee for every 5 charter schools in the portfolio. <i>It may be appropriate to have different criteria for primary authorizers (local districts and the SCSC) and GaDOE.</i>				
Majority of staff qualifications demonstrate experience in charter authorizing or other relevant experience (background in education accountability, school funding and finance, education law and legal compliance).				
 Duties assigned to staff align with the necessary authorizing obligations, specifically: Petition receipt and review, Accountability in the areas of academics, finances and operations, and Stakeholder (schools, families, public) support 				
Number of Criteria Met:	Needs Improvement (NI) 0-1	Adequate (A) 2	Exemplary (E) 3	Rating

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Standard 2. Financial Resources. The authorizer allocates the required financial resources to support charter schools and provides transparency on the availability and allocation of charter school funding. Pursuant to O.C.G.A. § 20-2-2068.1 and O.C.G.A. § 20-2-2089							
Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)			
 Appropriately publishes and shares calculation of earning for each charter school in accordance with law, specifically: GaDOE/SBOE/SCSC- district allotment sheets Local Districts- allotment sheet itemizing the calculation of state, local and federal allocations to be provided. 							
Withholds no more than the legally allowable administration fee							
Publishes a budget that explicitly addresses how revenues are commensurate with expenditures related to actual administrative services provided to the charter school							
	Needs Improvement (NI)	Adequate (A)	Exemplary (E)	Rating			
Number of Criteria Met:	0-1	2	3				

Standard 3. Petition Application. The authorizer publishes a written			irements and timelines	. The
authorizer provides reasonable and timely technical assistance and is res	ponsive to petitioner que	stions.		
Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Petition materials (application, timelines, process guidance) are published to the district's website in an easy-to- find location				
Petition requirements are clearly written and focus on content rather than form				
Times and locations for petition submission are clearly stated and convenient for the petitioner				
Staff contact information are available to provide technical assistance				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2-3	4	

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Standard 4. Petition Review. The authorizer conducts petition review in accordance with state requirements. The petition review includes an evaluation team of no fewer than three individuals with diverse expertise, with at least one of the individuals having charter school experience, and the review is free of conflicts of interest.

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Petition evaluation team includes at least three individuals that have varied and relevant skills and backgrounds		-		
Petition evaluation rubrics are posted on the district's website				
The review process includes an interview				
Petition review and interview process are free of conflict of interest				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2-3	4	

Standard 5. Petition Decisions. The authorizer grants charters only to petitioners that have demonstrated competence and capacity to succeed in all aspects of the school, consistent with the expectations established in the performance contract. The authorizer makes petition decisions that are free from conflicts of interest.

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Decisions are based on the petition evaluation rubric and applicable accountability metrics		-		
If denied, petitioner is provided a written detailed description of deficiencies				
Recommendations are evidenced based and include a description of reasons for denial (O.C.G.A. § 20-2-2063.)				
Recommendations are shared with petitioners at least one week prior to board meeting and within 90 days of receiving the application (O.C.G.A. § 20-2-2064(a) and (b))				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2-3	4	

Standard III. Performance Contracting

Standard 6. Pre-Opening Period. The authorizer establishes clear expectations for the pre-opening period including, but not limited to, expectations regarding facilities, student enrollment, board development, and more.

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Pre-opening expectations are clearly outlined to include timelines, deliverables, and responsible parties and establish criteria which may trigger a deferred opening.		-		
Pre-opening expectations specify facility requirements that obtain, GaDOE Facilities Division sign off and a Certificate of Occupancy and submitting an Emergency Plan to required agencies				
Pre-opening expectations specify student enrollment requirements including a minimum and maximum threshold to operate				
Pre-opening expectations specify board development requirements including required trainings, policy development and operational oversight procedures				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2-3	4	

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Standard 7. Performance Standards. The authorizer, through the performance contract, establishes the academic, financial, and operational performance standards under which schools will be evaluated, using objective and verifiable measures of student achievement and growth as the primary measure of school quality.

measure of school quality.				
Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Targets, thresholds or goals for each evaluation measure are clearly defined		-		
Evaluation measures allow for annual evaluation				
Data sources used to evaluate performance are objective and verifiable				
Academic standards include both student achievement and student progress measures				
Financial, operational and governance standards are grounded in best practice and law				
Operational standards include measures in the following areas: educational program compliance, financial oversight, governance and transparency, protecting the rights of students and employees, and ensuring a safe school environment				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-2	3-5	5-6	

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Standard 8. Contract Terms. The authorizer executes an initial contract school and the authorizer.	ract for a term of five year	s that clearly outlines the	e rights and responsibili	ties of the
Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Executes a contract with a legally incorporated, nonprofit governing board independent of the authorizer				
Initial contract terms are five years				
Contract include applicable state and federal law and requirements				
Specific training requirements not otherwise required under state law are either included in the charter contract or charter schools are notified at least one year prior to the requirement going into effect.				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2-3	4	

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Standard 9. Authorizer Obligations. The contract articulates the reequitable per-pupil funding. The authorizer follows all authorizing obligations.	•		I provide to the school	and
Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Specific services provided by authorizer to the charter school are outlined in a written contract or agreement, if applicable		-		
Contract and/or related agreements establish equitable per-pupil funding				
Local authorizers make unused (as defined by 20-2-2068.2 (h)(2)) facilities available to local charters. GaDOE ensures local districts comply and the SCSC follows guidelines from the state properties commission.				
Authorizer publicly posts current list of unused facilities- if applicable				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2-3	4	

Category IV. Oversight and Evaluation Standard 10. Compliance Monitoring. The authorizer defines, communicates and effectively implements the processes, methods, and timing of collecting and reporting school performance and compliance information. The authorizer conducts school visits as appropriate and necessary, and annually publishes school performance data. Met Criteria? **Evaluation Criteria Documentation Review** Authorizer Debrief **School Survey** (Y/N)Authorizer has a documented process for oversight and evaluation that aligns with the standards outlined in the performance contract Authorizer has a documented process for conducting school site visits, that includes a review of school performance and compliance in alignment with the performance contract, and authorizer conducts an on-site visit at least once during the school's contract term. Authorizer annually publishes, to their website, a report with individual level and aggregate level school performance results based on evaluation measures included in the performance contracts (Suggestion: For three party contracts a combination of published reports may satisfy the criteria, i.e. GaDOE posts aggregate level results, local districts post school level results) Results of authorizer's compliance monitoring process are documented Needs Improvement Adequate Exemplary Rating Number of Criteria Met: 0-1 2-3 4

Standard 11. Intervention. The authorizer gives schools evidence-ba schools reasonable time and opportunity for remediation.	sed, and timely notice of	contract violations or per	formance deficiencies,	allows
Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Following each compliance site visit the authorizer provides written notification that includes information collected during the site visit, a summary of findings, areas needing improvement and is tied directly to applicable law or contract requirements		-		
Authorizer informs school of any contract breaches or areas of noncompliance in a reasonable timeframe				
Authorizer allows school adequate/reasonable time to remedy any identified areas of noncompliance				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2	3	

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Standard 12. Upholds Charter School Autonomy. The authorizer upholds charter school autonomy in school governance, instructional program implementation, personnel, and budgeting by refraining from directing or participating in educational decisions or choices that are appropriately within a school's purview under the charter law or contract.

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
No evidence that authorizer's practices interfere with school's autonomy in school governance, instructional program implementation, personnel, and budgeting				
	Needs Improvement	Adequate	Exemplary	
Number of Criteria Met:	0	1		

Category V. Renewal and Termination

Standard 13. Renewal Process. The authorizer clearly communicates to schools the criteria for charter termination, renewal, and non-renewal that are consistent with the terms of the charter contract. The renewal process includes a written application and an opportunity for an interview. The authorizer promptly communicates renewal decisions to the school community and public within a timeframe that allows parents and students to exercise choices for the coming school year.

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Renewal process is documented and includes a written renewal application and an opportunity interview				
Renewal criteria are transparent, specific and align to performance standards and expectations outlined in the charter contract				
Renewal criteria consider a track record of performance over the course of the charter term, thus includes multiple years of evidence				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-1	2	3	

Georgia Standards for Quality Charter School Authorizing Evaluation: Authorizer Evaluation Rubric

Standard 14. Renewal Decisions. The authorizer bases renewal decisions on a thorough analyses of a comprehensive body of evidence as defined in the charter contract, with objective and verifiable measures of student achievement and growth as the primary measure of school quality. The authorizer ensures the renewal decision-making processes are free of conflicts of interest

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Renewal information, renewal criteria and process, are published in a publicly accessible location				
Renewal/nonrenewal recommendations are provided through prompt, written notification to the school's governing board and the public within a reasonable timeframe, following the availability of necessary data, as to provide parents and students time to exercise choices for the upcoming school year				
Standard renewal terms are granted to schools that achieved their academic targets and are fiscally and operationally viable				
Recommendations include a detailed, objective and evidence-based explanation for the decision				
Authorizer utilizes policy or procedure to ensure individuals involved in the renewal decision are free from conflicts of interest				
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0-2	3-4	5	

Standard 15. Closure/Termination. In the event of school closure, either at the conclusion of the charter term or mid-term, the authorizer oversees and works with the school governing board and leadership in carrying out 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. GaDOE shall provide for a process to ensure all aforementioned obligations are met in the event that a local district authorizer is unable to facilitate or complete a closure protocol.

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
Authorizer has a written policy for termination procedures that ensures timely notification to parents, orderly transition of students and student records to new schools, disposition of school funds, property, and assets in accordance with law and effectively implements policy in the event of a school closure.		-		
	Needs Improvement	Adequate	Exemplary	Rating
Number of Criteria Met:	0	1		

Georgia Milestone Results 2019, 2021 and 2022 Georgia State Averages and State Charter School Averages

ELA Performance Results – Elementary and Middle Grades

State Charter Schools Commission Average

ELA		Mea	n Scale S	Score		%	Developi	ng Learn	ner & Abo	ve	% Proficient Learner & Above					
Grade	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	
3	502	497	506	\langle	4	68	62	70	\searrow	2	36	34	40	\rightarrow	4	
4	511	505	508	\langle	-3	77	71	74	\langle	-3	40	37	39	\langle	-1	
5	515	509	514	$\overline{}$	-1	77	75	76	\langle	-1	43	38	43	\searrow	0	
6	515	508	503	/	-12	75	70	66	/	-9	47	40	37		-10	
7	514	510	506	/	-8	78	74	73	/	-5	42	42	36		-6	
8	516	515	516		0	83	78	81		-2	45	44	42		-3	

Georgia (State) Average

ELA		Mea	n Scale S	Score		%	Developi	ng Learn	er & Abo	ve	% Proficient Learner & Above					
Grade	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	
3	511	500	499		-12	71	62	63		-8	42	36	36		-6	
4	514	504	504		-10	75	68	69		-6	42	37	38	<	-4	
5	517	510	512		-5	76	73	75	\searrow	-1	45	39	41		-4	
6	516	509	507	/	-9	74	69	67	/	-2	46	42	39	/	-7	
7	511	506	504		-7	72	70	70		-2	39	39	36		-3	
8	519	512	513		-6	80	75	77		-3	47	41	41		-6	

MATH Performance Results – Elementary and Middle Grades

Math		Mear	n Scale S	Score		%	Developi	ng Learn	er & Abo	% Proficient Learner & Above					
Grade	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22
3	515	507	523	\checkmark	8	80	73	85	\searrow	5	41	33	47	\searrow	6
4	517	509	519	\searrow	2	82	72	81	\searrow	-1	43	35	51	\searrow	8
5	505	499	499		-6	69	62	62		-7	32	29	29		-3
6	504	495	494		-10	74	65	65		-9	27	24	23	/	-4
7	511	506	505		-6	77	73	72		-5	34	32	30		-4
8	499	496	506	\rightarrow	7	67	62	68	\searrow	1	26	23	33	\sim	7

State Charter Schools Commission Average

Georgia (State Average)

Math		Mear	n Scale S	Score		% Developing Learner & Above						% Proficient Learner & Above					
Grade	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22		
3	525	514	519	\searrow	-6	82	76	79	\searrow	-3	52	38	43	\searrow	-9		
4	525	517	520	\langle	-5	82	75	77		-5	49	43	44	<	-5		
5	517	508	511	\searrow	-6	76	67	67		-9	41	35	37	\searrow	-4		
6	517	505	504	/	-13	78	69	67		-11	40	30	31	<	-9		
7	521	512	512		-9	78	74	74		-4	43	36	35		-8		
8	508	505	510	\searrow	2	73	67	70	\searrow	-3	35	32	36	\searrow	1		

High School Performance Results

State Charter Schools Commission Average

Content Area		Mea	n Scale S	core		%	Developi	ng Learn	er & Abo	ve	% Proficient Learner & Above				
Content Area	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22
American Literature & Composition	510	503	518	\checkmark	8	75	75	84		9	41	35	48	\sim	7
Algebra I	499	494	509	\rightarrow	10	64	58	68	\langle	4	30	29	36		6
Biology	512	515	514	\frown	2	68	67	70	\checkmark	2	42	44	42	\land	0
United States History	509	510	510		1	72	71	73	\searrow	1	39	32	38	\sim	-1

Georgia (State) Average

Content Area	Mean Scale Score			% Developing Learner & Above				% Proficient Learner & Above							
	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22	2019	2021	2022	Trend	19-22
American Literature & Composition	518	490	509	\langle	-9	80	65	77	\langle	-3	47	30	42	\searrow	-5
Algebra I	516	498	511	\langle	-5	73	61	68	\langle	-5	41	30	37	\langle	-4
Biology	527	512	521	\searrow	-6	71	67	71	\sim	0	49	41	46	\searrow	-3
United States History	526	500	510	\searrow	-16	78	65	70		-8	48	30	39	\searrow	-9



Georgia Milestones Results 2021-2022

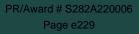




Georgia Milestones Overview

- Mandatory statewide summative assessments for all public schools in Georgia.
 - USED approved GaDOE's addendum to the state ESSA plan; CCRPI will not include growth/progress scores. This year will serve as a new baseline.
- Students are tested on Georgia Standards of Excellence:
 - in ELA and Math each year in grades 3-8 and,
 - in Algebra I, American Lit., Biology and US History at the high school level.
- Scores are grouped into four categories of learners:
 - Beginning, Developing, Proficient, Distinguished





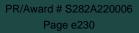
Participation Rates

Participation in the Milestones assessments were down across the state in SY2020-2021 due to health and safety concerns related to the COVID pandemic. Participation rates recovered in SY2021-2022. SCSC participation rates are as follows:

- 72-75% in 2021 compared to 92-93% in the elementary grades in 2022 (both ELA and Math)
- 61-65% in 2021 compared to 91% in the middle grades in 2022 (both ELA and Math)
- High School participation rates will be released with CCRPI results



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Georgia Milestones Results

- On average, SCSC students have recovered to near or above prepandemic performance levels in the upper elementary grades in math and ELA, whereas the state has been slower to recover.
- Within the middle school grade band, both SCSC and Georgia students experienced a continued decline in academic performance on average in grades 6 and 7 and a slight bounce in grade 8.
- On average, SCSC students within the high school grade band have recovered to near or above pre-pandemic performance levels on End of Course exams. Georgia high school students have not yet fully rebounded from the impacts of the pandemic.





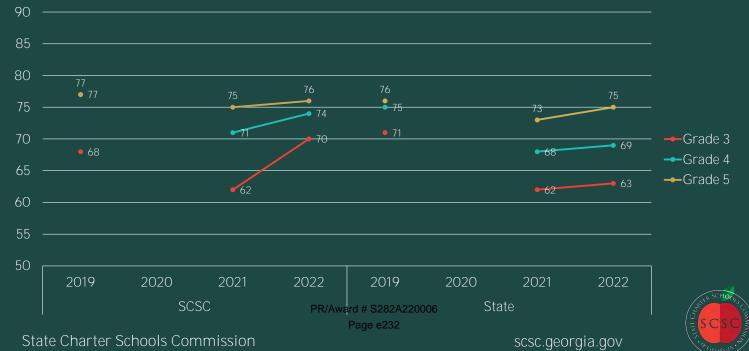
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State Charter Schools Commission

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Elementary Grade Band

% Developing & Above 2019-2022 Georgia Milestones English Language Arts



Elementary Grade Band

% Developing & Above 2019-2022 Georgia Milestones Mathematics



Middle Grade Band

% Developing & Above 2019-2022 Georgia Milestones English Language Arts

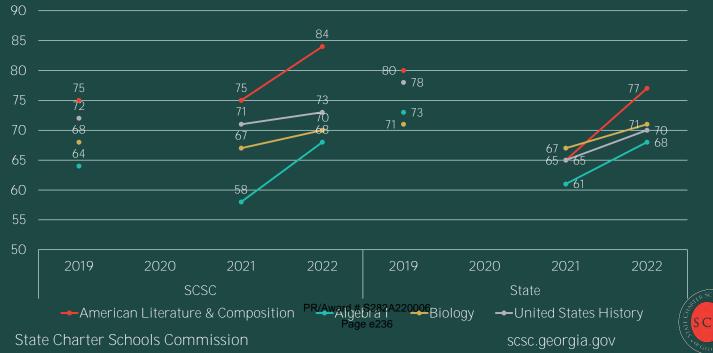


Middle Grade Band

% Developing & Above 2019-2022 Georgia Milestones Mathematics



High School Grade Band % Developing & Above 2019-2022 Georgia Milestones End of Course Exams



Geographic District Comparisons

A majority of state charter schools are outperforming the district in which they are located.

- 17 of 28 (61%) of state charter schools serving elementary grades had higher % of students scoring at developing learner and above, in both ELA and Math.
- 18 of 29 (62%) of state charter schools serving middle grades had higher % of students scoring at developing learner and above, in both ELA and Math.
- 8 of 15 (53%) of state charter schools serving high school grades had higher % of students scoring at developing learner and above, in Algebra, American Lit., Biology, and US History.





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Next Steps:

- As a reminder, SCSC staff will calculate school level attendance zone comparisons using CCRPI data when released later this fall.
- SCSC is contracting with Georgia Southern University research partners to conduct a value-added model for 2022 in absence of GaDOE generating growth data.
- SCSC staff will communicate with schools how academic CPF measures may be adapted for 2021-22 school year as a result of the recently approved addendum to the state's ESSA plan.



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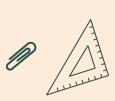
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State Charter Schools Commission











2021-2022 Georgia Milestone Results - % Developing Learner and Above			E		MA	ATH
	District-Geographic	Grade	SCSC		SCSC	District
SCSC School	Location	Band	School	District	School	District
ACADEMY FOR CLASSICAL EDUCATION	BIBB COUNTY	E	94.3	54.8	98.5	57.5
ATLANTA HEIGHTS CHARTER SCHOOL	ATLANTA PUBLIC SCHOOLS	E	43.9	52.9	47.5	56.0
ATLANTA SMART ACADEMY	ATLANTA PUBLIC SCHOOLS	E	60.0	52.9	28.2	56.0
BACONTON COMMUNITY CHARTER SCHOOL	MITCHELL COUNTY	E	73.5	47.9	81.2	64.0
BROOKHAVEN INNOVATION ACADEMY	GWINNETT COUNTY	E	70.2	74.4	73.5	78.7
CHEROKEE CHARTER ACADEMY	CHEROKEE COUNTY	E	67.6	79.0	67.9	85.0
CIRRUS ACADEMY CHARTER	BIBB COUNTY	Е	40.1	54.8	44.8	57.5
COWETA CHARTER ACADEMY	COWETA COUNTY	E	86.2	77.6	84.5	83.2
D.E.L.T.A. STEAM ACADEMY	DOUGLAS COUNTY	E			74.0	69.4
DUBOIS INTEGRITY ACADEMY	CLAYTON COUNTY	E	60.8	46.3	53.6	48.4
ETHOS CLASSICAL CHARTER SCHOOL	ATLANTA PUBLIC SCHOOLS	E	64.9	52.9	62.2	56.0
FURLOW CHARTER SCHOOL	SUMTER COUNTY	E	77.0	37.0	82.4	30.3
GENESIS INNOVATION ACADEMY FOR BOYS	ATLANTA PUBLIC SCHOOLS	E	56.1	52.9	77.8	56.0
GENESIS INNOVATION ACADEMY FOR GIRLS	ATLANTA PUBLIC SCHOOLS	E	76.8	52.9	74.9	56.0
GEORGIA CONNECTIONS ACADEMY	STATEWIDE	E	76.9	67.0	46.8	72.0
GEORGIA CYBER ACADEMY	STATEWIDE	E	66.7	67.0	53.7	72.0
GEORGIA SCHOOL FOR INNOVATION AND THE CLASSICS	RICHMOND COUNTY	E	78.8	48.5	85.5	49.7
INTERNATIONAL ACADEMY OF SMYRNA	COBB COUNTY	E	71.8	77.0	72.2	81.0
INTERNATIONAL CHARTER ACADEMY OF GA	GWINNETT COUNTY	E				
INTERNATIONAL CHARTER SCHOOL OF ATL	FULTON COUNTY	E	93.3	73.9	94.9	78.2
IVY PREPARATORY ACADEMY INC	DEKALB COUNTY	E	69.8	59.6	64.6	60.9
LIBERTY TECH CHARTER ACADEMY	FAYETTE COUNTY	E	78.6	85.7	82.1	88.7
NORTHWEST CLASSICAL ACADEMY	COBB COUNTY	E	88.1	77.0	86.7	81.0
ODYSSEY SCHOOL	COWETA COUNTY	E	80.9	77.6	78.4	83.2
PATAULA CHARTER ACADEMY	CALHOUN COUNTY	E	66.4	29.1	74.7	46.3
RESURGENCE HALL CHARTER SCHOOL	FULTON COUNTY	E	89.2	73.9	97.9	78.2
SAIL CHARTER ACADEMY	COLUMBIA COUNTY	Е	83.3	84.1	85.0	88.7
SCINTILLA CHARTER ACADEMY	VALDOSTA CITY	Е	87.3	47.1	95.2	58.3
SLAM ACADEMY OF ATLANTA	FULTON COUNTY	Е				
SOUTHWEST GEORGIA STEM CHARTER ACADEMY	RANDOLPH COUNTY	E	69.8	37.1	75.7	55.5
SPRING CREEK CHARTER ACADEMY	DECATUR COUNTY	E	67.1	65.6	76.9	71.1
YI HWANG ACADEMY OF LANGUAGE EXCELLENCE	GWINNETT COUNTY 282A220006	E				

2021-2022 Georgia Milestone Results - % Developing Learner and Above				LA	MATH		
	District-Geographic	Grade	SCSC		SCSC	District	
SCSC School	Location	Band	School	District	School	District	
ACADEMY FOR CLASSICAL EDUCATION	BIBB COUNTY	М	96	58	98	44	
ATLANTA HEIGHTS CHARTER SCHOOL	ATLANTA PUBLIC SCHOOLS	М	58	60	49	54	
ATLANTA SMART ACADEMY	ATLANTA PUBLIC SCHOOLS	М	53	60	31	54	
ATLANTA UNBOUND ACADEMY	FULTON COUNTY	М	67	77	56	70	
BACONTON COMMUNITY CHARTER SCHOOL	MITCHELL COUNTY	М	80	51	80	56	
BROOKHAVEN INNOVATION ACADEMY	GWINNETT COUNTY	М	79	76	72	75	
CHEROKEE CHARTER ACADEMY	CHEROKEE COUNTY	М	77	78	70	81	
CIRRUS ACADEMY CHARTER	BIBB COUNTY	М	50	58	45	44	
COWETA CHARTER ACADEMY	COWETA COUNTY	М	87	76	84	77	
DUBOIS INTEGRITY ACADEMY	CLAYTON COUNTY	М	66	57	47	48	
FULTON LEADERSHIP ACADEMY	FULTON COUNTY	М	59	77	53	70	
FURLOW CHARTER SCHOOL	SUMTER COUNTY	М	78	50	65	47	
GENESIS INNOVATION ACADEMY FOR BOYS	ATLANTA PUBLIC SCHOOLS	М	69	60	70	54	
GENESIS INNOVATION ACADEMY FOR GIRLS	ATLANTA PUBLIC SCHOOLS	М	80	60	62	54	
GEORGIA CONNECTIONS ACADEMY	STATEWIDE	М	79	70	62	68	
GEORGIA CYBER ACADEMY	STATEWIDE	М	78	70	70	68	
GEORGIA SCHOOL FOR INNOVATION AND THE CLASSICS	RICHMOND COUNTY	М	88	62	90	53	
INTERNATIONAL CHARTER SCHOOL OF ATL	FULTON COUNTY	М	99	77	94	70	
IVY PREPARATORY ACADEMY INC	DEKALB COUNTY	М	76	64	68	58	
LIBERTY TECH CHARTER ACADEMY	FAYETTE COUNTY	М	85	89	85	88	
NORTHWEST CLASSICAL ACADEMY	COBB COUNTY	М	92	80	89	80	
ODYSSEY SCHOOL	COWETA COUNTY	М	86	76	82	77	
PATAULA CHARTER ACADEMY	CALHOUN COUNTY	М	73	44	76	36	
SAIL CHARTER ACADEMY	COLUMBIA COUNTY	М	79	83	69	84	
SCINTILLA CHARTER ACADEMY	VALDOSTA CITY	М	87	58	95	50	
SLAM ACADEMY OF ATLANTA	FULTON COUNTY	М					
SOUTHWEST GEORGIA STEM CHARTER ACADEMY	RANDOLPH COUNTY	М	72	56	70	56	
SPRING CREEK CHARTER ACADEMY	DECATUR COUNTY	М	76	51	69	47	
STATESBORO STEAM ACADEMY	BULLOCH COUNTY	М	70	69	58	69	
UTOPIAN ACADEMY FOR THE ARTS	CLAYTON COUNTY	М	72	57	52	48	

2021-2022 Georgia Milestone Results - % Deve	American	Literature	Algebra I		
SCSC School	District-Geographic Location	SCSC School	District	SCSC School	District
ACADEMY FOR CLASSICAL EDUCATION	BIBB COUNTY	96.6	58.0	99.3	35.7
BACONTON COMMUNITY CHARTER SCHOOL	MITCHELL COUNTY	90.0	60.0	73.8	50.0
FULTON LEADERSHIP ACADEMY	FULTON COUNTY	46.2	82.9	34.1	71.2
FURLOW CHARTER SCHOOL	SUMTER COUNTY	77.4	58.6	30.4	
GENESIS INNOVATION ACADEMY FOR BOYS	ATLANTA PUBLIC SCHOOLS			64.7	48.6
GENESIS INNOVATION ACADEMY FOR GIRLS	ATLANTA PUBLIC SCHOOLS			72.2	48.6
GEORGIA CONNECTIONS ACADEMY	STATEWIDE	90.9	77.0	61.1	68.0
GEORGIA CYBER ACADEMY	STATEWIDE	80.2	77.0	60.2	68.0
GEORGIA FUGEES ACADEMY CHARTER SCHOOL	DEKALB COUNTY				
GEORGIA SCHOOL FOR INNOVATION AND THE CLASSICS	RICHMOND COUNTY	82.9	52.3	71.2	29.8
PATAULA CHARTER ACADEMY	CALHOUN COUNTY	92.5	56.4	57.5	65.3
SOUTHWEST GEORGIA STEM CHARTER ACADEMY	RANDOLPH COUNTY			70.8	18.1
STATESBORO STEAM ACADEMY	BULLOCH COUNTY	100.0	75.3	59.3	65.9

2021-2022 Georgia Milestone Results - % Deve	Biol	ogy	US History		
SCSC School	District-Geographic Location	SCSC School	District	SCSC School	District
ACADEMY FOR CLASSICAL EDUCATION	BIBB COUNTY	96.3	49.7	97.0	39.7
BACONTON COMMUNITY CHARTER SCHOOL	MITCHELL COUNTY	75.0		74.1	26.7
FULTON LEADERSHIP ACADEMY	FULTON COUNTY	46.4	73.2	52.2	69.8
FURLOW CHARTER SCHOOL	SUMTER COUNTY	61.1	47.1	64.0	46.4
GENESIS INNOVATION ACADEMY FOR BOYS	ATLANTA PUBLIC SCHOOLS				
GENESIS INNOVATION ACADEMY FOR GIRLS	ATLANTA PUBLIC SCHOOLS				
GEORGIA CONNECTIONS ACADEMY	STATEWIDE	75.8	70.5	72.7	70.3
GEORGIA CYBER ACADEMY	STATEWIDE	71.4	70.5	68.9	70.3
GEORGIA FUGEES ACADEMY CHARTER SCHOOL	DEKALB COUNTY	28.1	40.8		
GEORGIA SCHOOL FOR INNOVATION AND THE CLASSICS	RICHMOND COUNTY	81.1	40.8	73.7	35.8
PATAULA CHARTER ACADEMY	CALHOUN COUNTY	70.3	38.9	77.8	41.9
SOUTHWEST GEORGIA STEM CHARTER ACADEMY	RANDOLPH COUNTY	80.0	45.9		
STATESBORO STEAM ACADEMY	BULLOCH COUNTY	89.5	64.0		

Note: -- represents where there were too few students tested to report a score. In the high school course, it can also mean the school did not administer the exam. Green cells are higher where the state charter school had a higher score than the district in which they are located.

Georgia Principles and Standards for Charter School Authorizing

Category I. Authorizer Commitment & Capacity

Standard 1. Human Resources. The authorizer identifies appropriate personnel to carry out its authorizing obligations, including the point(s) of contact who will coordinate charter school support.

Standard 2. Financial Resources. Pursuant to O.C.G.A. § 20-2-2068.1 and O.C.G.A. § 20-2-2089, the authorizer allocates the required financial resources to support charter schools, treats charter schools no less favorably than other local schools within the system unless otherwise provided by law, and provides transparency on the availability and allocation of charter school funding.

Category II. The Petition Process

Standard 3. Petition Application. The authorizer publishes a written petition application in accordance with state requirements and timelines. The authorizer provides reasonable and timely technical assistance and is responsive to petitioner questions.

Standard 4. Petition Review. The authorizer conducts petition review in accordance with state requirements. The petition review includes an evaluation team of no fewer than three individuals with diverse expertise, with at least one of the individuals having charter school experience. For the review of local charter petitions at least one of the individuals on the evaluation team shall have district administrative experience.

Standard 5. Petition Decisions. The authorizer grants charters only to petitioners that have demonstrated competence and capacity to succeed in all aspects of the school, including a strong plan for improving student opportunities and outcomes. The authorizer makes petition decisions that are free from conflicts of interest.

Category III. Performance Contracting

Standard 6. Pre-Opening Period. The authorizer establishes clear and necessary, but not overly burdensome expectations for the pre-opening period including, but not limited to, expectations regarding facilities, student enrollment and board development.

Standard 7. Performance Standards. The authorizer, through the performance contract, establishes high academic, financial, and operational performance standards under which schools will be evaluated, using objective and verifiable measures of student achievement and growth as the primary measure of school quality.

Standard 8. Contract Terms and Agreements. The authorizer executes an initial contract for a term of five years that clearly outlines the rights and responsibilities of the school and the authorizer. Agreements related to funding or in-kind services not required by OGGA §20-2-2068.1 or §20-2-2089 or that are not included in the charter contract, must be negotiated and executed in writing and signed by

Georgia Department of Education December 2, 2021 · Page 1 of 2 PR/Award # S282A220006 Page e243 the local authorizer and charter school (for local charter schools) or the State Charter Schools Commission and state charter school (for state charter schools).

Standard 9. Authorizer Obligations. The authorizer follows all authorizing obligations outlined in law, State Board Rule, and the charter contract.

Category IV. Oversight and Evaluation

Standard 10. Compliance Monitoring. The authorizer protects the public interest and holds charter schools accountable for their obligations of governance, management, and oversight of public funds. The authorizer defines, communicates, and effectively implements the processes, methods, and timing of collecting and reporting school performance and compliance information. The authorizer conducts school visits as appropriate and necessary, and annually publishes school performance data.

Standard 11. Intervention. The authorizer gives schools evidence-based and timely notice of contract violations or performance deficiencies and allows schools reasonable time and opportunity for remediation.

Standard 12. Upholds Charter School Autonomy. The authorizer upholds charter school autonomy in school level governance, including personnel decisions, financial decisions, curriculum and instruction, resource allocation, establishing and monitoring the achievement of school improvement goals, and school operations.

Category V. Renewal and Termination

Standard 13. Renewal and Termination Process. The authorizer clearly communicates to schools the criteria for charter termination, renewal, and non-renewal that are consistent with the terms of the charter contract. The renewal process includes a written application and an opportunity for an interview.

Standard 14. Renewal Decisions. The authorizer bases renewal decisions on a thorough analyses of the criteria outlined in the charter contract, with objective and verifiable measures of student achievement and growth as the primary measure of school quality. The authorizer ensures the renewal decision-making processes are free of conflicts of interest. The authorizer communicates renewal decisions to the school community and public within a timeframe that allows parents and students to exercise choices for the coming school year.

Standard 15. Closure. In the event of school closure, either at the conclusion of the charter term or during the charter term, the authorizer oversees and ensures the school governing board and leadership carry out a detailed closure protocol that includes the provisions outlined in the charter contract, such as ensuring 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, rule and contract terms.

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Georgia Principles and Standards for Quality Charter School Authorizing



Code of Principles and Standards for Charter School Authorizers



- In 2017-2018 legislative session, Governor Deal signed HB430 into law
- § 20-2-2063.3. Code of principles and standards for charter school authorizers
 - Georgia Code Title 20 Education, Chapter 2 Elementary and Secondary Education, Article 31 Charter Schools Act of 1998
- Intent: Encourage authorizer accountability and quality charter school authorizing practices



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§ 20-2-2063.3 Part A

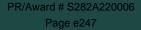
The State Board of Education (SBOE) and the State Charter Schools Commission (SCSC) shall jointly establish a code of principles and standards of charter school authorizing to guide local boards of education, the SBOE, and the SCSC in meeting high-quality authorizing practices. The principles and standards shall include:



- 1. Maintaining high standards for approving charter petitions;
- 2. Establishing high academic, financial, and operational performance standards for charter schools;
- 3. Annually monitoring, evaluating, and reporting charter school progress in meeting academic, financial, and operational performance standards,
- 4. Upholding charter school autonomy in school governance, instructional program implementation, personnel, and budgeting;
- 5. Protecting students and holding charter schools accountable for their obligations to all students; and
- 6. Protecting the public interest and holding charter schools accountable for their obligations of governance, management, and oversight of public funds.



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§ 20-2-2063.3 Part B, C & D

- 1. The SBOE shall provide for the annual review of local boards of education by an independent party (that has demonstrated history of evaluating authorizer performance) for adherence to the principles and standards of charter school authorizing practices.
- 2. A charter school authorized by a local board of education that fails to meet the principles and standards of charter school authorizing on its annual evaluation for two consecutive years may petition to transfer its charter authorization to the SCSC.
- 3. In its discretion, the SCSC may approve a charter school petitioning for authorization pursuant to paragraph (2)

C. The SCSC shall ensure that its adherence to the principles and standards of charter school authorizing practices is annually reviewed by an independent body that has a demonstrated history of evaluating charter school authorizers for quality authorizing practices.

D. The SBOE shall provide for or approve training for its staff and local board of education members on the principles and standards of charter school authorizers.





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Standards Overview

In December 2021, the SBOE adopted the standards as drafted by the SCSC and GaDOE and following a period of feedback.



The standards are designed to evaluate Georgia charter authorizing bodies on authorizing practices and are informed by both the National Association of Charter School Authorizers (NACSA)<u>Principles & Standards for Quality Charter School</u> <u>Authorizing</u> and <u>Georgia laws</u> and rules.

Five (5) Core Categories:

- 1. Authorizer Commitment & Capacity
- 2. The Petition Process
- 3. Performance Contracting
- 4. Oversight and Evaluation
- 5. Renewal and Termination



Evaluation Process

Evaluations will be conducted by an independent, third-party contracted by the State Board of Education or State Charter Schools Commission. The reviewer must have a demonstrated history of evaluating charter school authorizers for quality authorizing practices.

Process will include:

- 1) Orientation (Training)
- 2) School Surveys
- 3) Relevant Authorizing Documents
- 4) Authorizer Debrief and
- 5) Rubric Completion

Evaluation will distinguish between local and state authorizer obligations.



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Authorizer Ratings

Following the evaluation, every authorizer will be assigned an overall rating of:

- Needs Improvement;
- Adequate; or
- Exemplary

The overall rating categories are established in SBOE Rule 160-4-9-.06 Charter Authorizers, Financing, Management, And Governance Training.





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Category I. Authorizer Commitment & Capacity



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State Charter Schools Commission

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Authorizer Commitment & Capacity



Standard 1. Human Resources. The authorizer identifies appropriate personnel to carry out its authorizing obligations, including the point(s) of contact who will coordinate charter school support.

Example Criterion: The authorizer has dedicated staff to supporting the charter schools in its portfolio. Exemplary best practice specifies one employee for every 5 charter schools in the portfolio.



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State Charter Schools Commission

Authorizer Commitment & Capacity

Standard 2. Financial Resources. Pursuant to O.C.G.A. § 20-2-2068.1 and O.C.G.A. § 20-2-2089, the authorizer allocates the required financial resources to support charter schools, treats charter schools no less favorably than other local schools within the system unless otherwise provided by law, and provides transparency on the availability and allocation of charter school funding.

Example Criterion: Publishes and shares calculation of earning for each charter school in accordance with law, specifically:

• Allotment sheet itemizing the calculation of state, local and federal allocations to be provided.





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State Charter Schools Commission



Category II. The Petition Process



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State Charter Schools Commission

The Petition Process

Standard 3. Petition Application. The authorizer publishes a written petition application in accordance with state requirements and timelines. The authorizer provides reasonable and timely technical assistance and is responsive to petitioner questions.

Example Criterion: Petition materials (application, timelines, process guidance) are published to the authorizer's website in an easy-to- find location.



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State Charter Schools Commission

The Petition Process

Standard 4. Petition Review. The authorizer conducts petition review in accordance with state requirements. The petition review includes an evaluation team of no fewer than three individuals with diverse expertise, with at least one of the individuals having charter school experience. For the review of local charter petitions at least one of the individuals on the evaluation team shall have district administrative experience.

Example Criterion: Petition evaluation team includes at least three individuals that have varied and relevant skills and backgrounds (i.e. education, finance, school governance, charter experience, trained in petition review or have completed a relevant training).





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The Petition Process

Standard 5. Petition Decisions. The authorizer grants charters only to petitioners that have demonstrated competence and capacity to succeed in all aspects of the school, including a strong plan for improving student opportunities and outcomes. The authorizer makes petition decisions that are free from conflicts of interest.

Example Criterion: If denied, petitioner is provided a written detailed description of deficiencies.



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State Charter Schools Commission



Category III. Performance Contracting



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State Charter Schools Commission

Standard 6. Pre-Opening Period. The authorizer establishes clear and necessary, but not overly burdensome expectations for the pre-opening period including, but not limited to, expectations regarding facilities, student enrollment and board development.

Example Criterion: Pre-opening expectations specify board development requirements including required trainings, policy development and operational oversight procedures.





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State Charter Schools Commission

Standard 7. Performance Standards. The authorizer, through the performance contract, establishes high academic, financial, and operational performance standards under which schools will be evaluated, using objective and verifiable measures of student achievement and growth as the primary measure of school quality.

Example Criterion: Targets, thresholds or goals for each evaluation measure are clearly defined.





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State Charter Schools Commission

Standard 8. Contract Terms and Agreements. The authorizer executes an initial contract for a term of five years that clearly outlines the rights and responsibilities of the school and the authorizer. Agreements related to funding or in-kind services not required by OGGA §20-2-2068.1 or §20-2-2089 or that are not included in the charter contract, must be negotiated and executed in writing and signed by the local authorizer and charter school (for local charter schools) or the State Charter Schools Commission and state charter school (for state charter schools).

Example Criterion: Specific services provided by authorizer are negotiated and agreed to by both parties and are outlined in a written contract or agreement, if applicable.





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State Charter Schools Commission



Standard 9. Authorizer Obligations. The authorizer follows all authorizing obligations outlined in law, State Board Rule, and the charter contract.

Example Criterion: Contracts include applicable state and federal law and requirements.



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State Charter Schools Commission



Category IV. Oversight and Evaluation



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State Charter Schools Commission

Oversight and Evaluation

Standard 10. Compliance Monitoring. The authorizer protects the public interest and holds charter schools accountable for their obligations of governance, management, and oversight of public funds. The authorizer defines, communicates, and effectively implements the processes, methods, and timing of collecting and reporting school performance and compliance information. The authorizer conducts school visits as appropriate and necessary, and annually publishes school performance data.

Example Criterion: Authorizer annually publishes, to their website, a report with individual level and aggregate level school performance results based on evaluation measures included in the contracts.



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State Charter Schools Commission

Oversight and Evaluation

Standard 11. Intervention. The authorizer gives schools evidence-based and timely notice of contract violations or performance deficiencies and allows schools reasonable time and opportunity for remediation.

Example Criterion: Following each compliance site visit the authorizer provides written notification that includes information collected during the site visit, a summary of findings, areas needing improvement and is tied directly to applicable law or contract requirements.



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State Charter Schools Commission

Oversight and Evaluation

Standard 12. Upholds Charter School Autonomy. The authorizer upholds charter school autonomy in school level governance, including personnel decisions, financial decisions, curriculum and instruction, resource allocation, establishing and monitoring the achievement of school improvement goals, and school operations.

Example Criterion: The authorizer's practices recognize the school's autonomy in school governance, instructional program implementation, personnel, and budgeting.



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State Charter Schools Commission



Category V. Renewal and Termination



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State Charter Schools Commission

Renewal and Termination

Standard 13. Renewal and Termination Process. The authorizer clearly communicates to schools the criteria for charter termination, renewal, and non-renewal that are consistent with the terms of the charter contract. The renewal process includes a written application and an opportunity for an interview.

Example Criterion: Renewal criteria are transparent, specific and align to performance standards and expectations outlined in the charter contract.





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State Charter Schools Commission

Renewal and Termination

Standard 14. Renewal Decisions. The authorizer bases renewal decisions on a thorough analyses of the criteria outlined in the charter contract, with objective and verifiable measures of student achievement and growth as the primary measure of school quality. The authorizer ensures the renewal decision-making processes are free of conflicts of interest. The authorizer communicates renewal decisions to the school community and public within a timeframe that allows parents and students to exercise choices for the coming school year.

Example Criterion: Renewal/nonrenewal recommendations are provided through prompt, written notification to the school's governing board and the public within a reasonable timeframe, following the availability of necessary data, as to provide parents and students time to exercise choices for the upcoming school year.



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State Charter Schools Commission

Renewal and Termination

Standard 15. Closure. In the event of school closure, either at the conclusion of the charter term or during the charter term, the authorizer oversees and ensures the school governing board and leadership carry out a detailed closure protocol that includes the provisions outlined in the charter contract, such as ensuring 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, rule and contract terms.

Example Criterion: Authorizer has a written policy for termination procedures that ensures timely notification to parents, orderly transition of students and student records to new schools, disposition of school funds, property, and assets in accordance with law and effectively implements policy in the event of a school closure.





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Next Steps

Spring 2022:

- Finalize evaluation process.
- SCSC secures independent party for annual review of authorizer practices.
- GaDOE secures/provides training for local authorizers on adopted principles and standards.

Summer 2022:

- Independent party conducts annual review of SCSC authorizer practices.
- SCSC annual review is published.





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Questions?





SCSC Contact

Website:	scsc.georgia.gov
Twitter:	@SCSCGa
Address:	504 Twin Towers West,
	205 Jesse Hill Jr. Dr. SE

Phone:

(404) 656-2837



State Charter Schools Commission

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Relevant Documents Table

I. Authorizer Commitment & Capacity	Relevant Documents	
	Charter authorizer organizational chart to include currently filled and vacant positions and related job descriptions	
1 Human Resources	Resumes or bios of all charter authorizer staff and related contractors	
	Link to list if current charter schools on authorizer's website	
2. Financial Resources	 Authorizer annual budget, with detailed line items indicating revenues and expenditures 	
	Link to website where allotments sheets are published	
II. The Petition Process	Relevant Documents	
	Copy of the petition application for new schools	
3. Petition Application	 Documentation of the petition process, timeline and directions 	
	Link to petition liaison contact information on website	
	Link to application and application guidance on authorizer website	
	Bios/resumes of all individuals participating in the interview panel	
	 Written conflict of interest policy and signed affidavits by all interview panel participants 	
4. Petition Review	 Description of petition review process to include related timelines and terms for granting interviews 	
4. Fellion Review	Petition evaluation rubric	
	Interview schedule including panel assigned to each interview	
	 Link to where petition evaluation rubric can be found on authorizer's website 	
	Copies of petition cycle recommendations from the most recent application cycle (at least one approval and one denial)	
4. Petition Decisions	Copies of feedback provided to denied petitioners from the most recent application cycle	
	 Petition scoring documents, comments and/or completed checklists 	
	Copy of a recommendation email sent to petitioner	
III. Performance Contracting	Relevant Documents	
6. Pre-Opening Period	A document outlining pre-opening obligations	
7. Performance Standards	Copies of executed charter school contracts and/or performance frameworks with related information highlighted	
	Link to where contracts and performance framework results can be found on authorizer website	
	Documentation of data sources and calculation method for each measure used to assess school performance	
8. Contract Terms	Copies of executed charter school contracts with related information highlighted	
	Copies of executed charter school contracts with related information highlighted	
9. Authorizer Obligations	List of unused district facilities	
	Copies of related contracts or agreements between the school and authorizer	

Table continued next page

Georgia Standards for Quality Charter School Authorizing Evaluation: Relevant Documents Table

IV. Oversight & Evaluation	Relevant Documents	
	Documentation of oversight and evaluation process	
10. Compliance Manitoring	 Link to where oversight and evaluation process can be found on authorizer's website 	
10. Compliance Monitoring	 Documentation of process and timeline for conducting school visits 	
	 Link to where annual school performance reports can be found on authorizer's website 	
	Copy of a school site visit report	
11. Intervention	 Copy of a school's corrective action plan in response to site visit report 	
	 Copy of a breach of contract or noncompliance communication to a school 	
	Written narrative or documentation of authorizer's process for data collections, compliance requirement review, and	
12. Upholds Charter School Autonomy	dealing with charter school complaints.	
	 Written any agreement between two or more parties of the charter contract that is not the charter contract 	
V. Renewal and Termination	Relevant Documents	
	 Copies of charter school contracts with relevant information highlighted 	
13. Renewal Process	Copy of the renewal application	
13. Kellewal Flocess	 Written documentation of the renewal process and timeline 	
	 Link to where renewal information can be found on authorizer's website 	
	Copies of renewal recommendations from the most recent renewal cycle (one renewal and one nonrenewal if available)	
14. Renewal Decisions	 Copy of a communication sent to school with recommendation accompanying 	
	 Meeting minutes for renewal decisions and interviews 	
	 Conflict of interest (COI) policy and related signed COI forms from panelists 	
	 Documentation outlining the authorizer's termination procedures, closure process and timeline 	
15. Closure/Termination	• Any documentation required by the authorizer's termination policy (i.e. inventory sheets, final financial statements,	
	directory of record information, etc.)	
	Copy of closure commination to parents	

School Name:

Date:

Authorizer Name:

Number of Years authorized by Authorizer:

Current Charter Contract End Date:

Authorizer Commitment and Capacity.	
My charter authorizing office has an adequate number of staff with relevant experience to carry out its duties.	Agree Somewhat Agree Somewhat Disagree Disagree
I can readily find or have access to the calculation of earned funding for my school.	Agree Somewhat Agree Somewhat Disagree Disagree
I believe my authorizer responsibly uses funds earned from its administrative withhold to provide adequate services to my school.	Agree Somewhat Agree Somewhat Disagree Disagree
Please use the space below to provide additional information related to the abor response of Somewhat Disagree or Disagree is provided, a written response is re specific detail to support your response. Additional documentation may be uplo	equired. Please use
Petition Process. ONLY CHARTER SCHOOLS APPROVED IN THE MOST RECENT	APPLICATION CYCLE
ARE TO REPOND TO THE QUESTIONS IN THIS SECTION. Petition materials were posted on my authorizer's website in an easy to find location.	Agree Somewhat Agree Somewhat Disagree Disagree
Times and locations for petition submission were clearly stated and convenient.	Agree Somewhat Agree Somewhat Disagree Disagree
Staff were available to provide technical assistance	Agree Somewhat Agree Somewhat Disagree Disagree
I was provided access to petition evaluation rubrics and had a sufficient understanding of what was required to have my application approved.	Agree Somewhat Agree Somewhat Disagree

	Disagree
My application recommendation was shared with me at least one week prior to board meeting and within 90 days of receiving the application.	Agree Somewhat Agree Somewhat Disagree Disagree
I believe the petition process was free from conflicts of interest.	Agree Somewhat Agree Somewhat Disagree Disagree
Please use the space below to provide additional information related to the aboresponse of Somewhat Disagree or Disagree is provided, a written response is respecific detail to support your response. Additional documentation may be uplo	equired. Please use
Performance Contracting	I -
ONLY SCHOOLS IN THEIR PRE-OPENING OR FIRST YEAR OF OPERATIONS ARE TO RESPOND TO THIS QUESTION. OTHERWISE PLEASE LEAVE BLANK. Pre-opening expectations were clearly outlined to include timelines, deliverables, and responsible parties and establish criteria which may trigger a deferred opening.	Agree Somewhat Agree Somewhat Disagree Disagree
THIS QUESTION ONLY APPLIES TO SCHOOLS AUTHORIZED BY A LOCAL DISTIRCT. IF YOU ARE A STATE CHARTER SCHOOLS PLEASE LEAVE THIS QUESTION BLANK. I can readily find or have access to a list of my authorizer's unused facilities.	Agree Somewhat Agree Somewhat Disagree Disagree
The performance targets, thresholds or goals for my school are clearly defined within the charter contract and allow for annual evaluation.	Agree Somewhat Agree Somewhat Disagree Disagree
The academic performance standards in my charter contract include both student achievement and student progress measures.	Agree Somewhat Agree Somewhat Disagree Disagree
If changes, beyond what is captured in state law, occur to the performance expectations of my school, I am adequately notified through agreement via a charter contract amendment or I am given at least one year's notice before the change goes into effect.	Agree Somewhat Agree Somewhat Disagree Disagree
My authorizer has provided my school equitable per-pupil funding as prescribed under the law.	Agree Somewhat Agree Somewhat Disagree Disagree

Please use the space below to provide additional information related to the above questions. If a response of Somewhat Disagree or Disagree is provided, a written response is required. Please use specific detail to support your response. Additional documentation may be uploaded as evidence.

Oversight and Evaluation	
My authorizer does not interfere with my school's autonomy in school governance, instructional program implementation, personnel, or budgeting.	Agree Somewhat Agree Somewhat Disagree Disagree
The process my authorizer uses to evaluate my school's performance is clearly documented and aligns with the academic, financial and operational goals as outlined in my charter contract.	Agree Somewhat Agree Somewhat Disagree Disagree
My authorizer has/will conduct at least one compliance site visit during my school's current charter term and the expectations and processes related to that site visit are clearly documented.	Agree Somewhat Agree Somewhat Disagree Disagree
Following each compliance site visit my authorizer provided a written notification that included information collected during the site visit and a summary of findings that are tied directly to applicable law or contract requirements	Agree Somewhat Agree Somewhat Disagree Disagree
I can readily find on my authorizer's website my school's performance results based on evaluation measures included in the performance contracts.	Agree Somewhat Agree Somewhat Disagree Disagree
My authorizer notifies me of any contract breaches in a timely manner and I am provided a reasonable amount of time to remedy any identified areas of noncompliance.	Agree Somewhat Agree Somewhat Disagree Disagree
Please use the space below to provide additional information related to the aboresponse of Somewhat Disagree or Disagree is provided, a written response is respecific detail to support your response. Additional documentation may be uploa	equired. Please use

Renewal and Termination	
The criteria and process for charter renewal are published in a publicly accessible	Agree
location and include a written application and interview opportunity.	Somewhat Agree
	Somewhat Disagree
The criteria in which my school will be evaluated on to determine renewal are clear	Disagree Agree
and align with the performance expectations as outlined in the charter contract.	Somewhat Agree
	Somewhat Disagree
	Disagree
My authorizer assesses my school's performance over the course of the charter term. Multiple years of data are evaluated when reviewing my school's performance for	Agree
renewal purposes.	Somewhat Agree Somewhat Disagree
	Disagree
ONLY SCHOOLS THAT HAVE GONE THROUGH THE RENEWAL PROCESS ARE TO	Agree
RESPOND TO THIS QUESTION. OTHERWISE PLEASE LEAVE BLANK.	Somewhat Agree
I believe the renewal process was free from conflicts of interest.	Somewhat Disagree
ONLY SCHOOLS THAT HAVE GONE THROUGH THE RENEWAL PROCESS ARE TO	Disagree Agree
RESPOND TO THIS QUESTION. OTHERWISE PLEASE LEAVE BLANK.	Somewhat Agree
My authorizer provided my school's renewal/nonrenewal recommendation via written	Somewhat Disagree
notification to the school's governing board within a reasonable timeframe, following the availability of necessary data.	Disagree
ONLY SCHOOLS THAT HAVE GONE THROUGH THE RENEWAL PROCESS ARE TO	Agree
RESPOND TO THIS QUESTION. OTHERWISE PLEASE LEAVE BLANK.	Somewhat Agree
A detailed, objective and evidence-based explanation for the decision was included in the recommendation provided by my authorizer.	Somewhat Disagree Disagree
Please use the space below to provide additional information related to the abo	
response of Somewhat Disagree or Disagree is provided, a written response is re	•
specific detail to support your response. Additional documentation may be uplo	aded as evidence.

Please use the space below to provide any additional information you think we should know about your charter authorizer that was not covered in the above questions.

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Overview

Georgia law requires all charter school authorizers be evaluated on an annual basis. The Georgia Standards for Quality Authorizing Evaluation process is designed to evaluate authorizing bodies on 15 standards of quality practices informed by the National Association of Charter School Authorizers (NACSA) and Georgia laws and rules.

Any entity authorizing a charter school **(Or receiving an application?)** in Georgia will be evaluated against the 15 Georgia Standards for Quality Charter School Authorizing as outlined in the Georgia Authorizer Evaluation Rubric (GAE Rubric). The standards have specific evaluation criteria that detail the quality practice on which the authorizer will be evaluated and are organized into five (5) main categories:

- I. Authorizer Commitment & Capacity
- II. The Petition Process
- III. Performance Contracting
- IV. Oversight and Evaluation
- V. Renewal and Termination

The final product of the evaluation is a completed GAE Rubric. One GAE Rubric is completed for each authorizer. The completed rubric shall include the authorizer's overall quality rating, the authorizer's rating on each standard and any relevant evaluative comments.

Ratings

Evaluation Criteria: Each of the 15 standards are comprised of 1-6 evaluation criteria that specify related quality authorizing practices. The number of associated criteria varies by standard, emphasizing areas of importance to the Georgia authorizing landscape. For each criteria the evaluation team determines whether the authorizer has successfully

fulfilled the practice. In the GAE Rubric this is signified by a Yes or No in the Met Criteria box. The evaluation team shall consider all evidence collected during the evaluation process (described in detail later in this document) when determining whether the authorizer successfully met the criteria. Specifically, the evaluation team shall consider the following questions:

- 1. Did the authorizer have all documentation that is required to be publicly published on its website available as such?
- 2. Did the authorizer submit all other relevant documentation that was not required to be published to its website?
- 3. Did the relevant documentation describe authorizing practices that are consistent with the evaluation criteria and quality authorizing standard?
- 4. Did the school survey responses support the authorizer's documented practices?
- 5. Did the authorizer's verbal commentary align with their documented processes and the relevant quality authorizing practice?

AUTOMATIC YES: If the evaluation team can answer "yes" to all of the questions above, then the authorizer shall receive a "Yes" designation for the associated evaluation criteria.

AUTOMATIC NO: If the relevant documentation was not submitted or published to the authorizer's website when required by rule or law, the evaluation team shall automatically revert to assigning the authorizer a "No" for the associated evaluation criteria.

In all other cases the evaluation team will consider the breadth of documentation and responses received to determine a holistic view of the authorizer's practices and will use their professional judgment in assigning "Yes" or "No" designations for each criterion. The majority of evidence should be positive in order for a "Yes" designation to be assigned.

YES EXAMPLE: The authorizer submitted the relevant documentation and it is appropriately published to their website. The identified processes seem to mostly align with the standard, but some sections are unclear or incomplete. However, responses from the school surveys were positive and the authorizer was able to provide verbal commentary that demonstrated their practices align with the quality authorizing practice. In this case, the authorize should receive a "Yes" designation.

NO EXAMPLE: The authorizer submitted the relevant documentation and it is appropriately published to their website. The identified processes align with the standard. However, responses from the school surveys were negative, schools submitted evidence that the authorizer did not follow their practice as outlined in the documentation and the authorizer provided verbal commentary that conflicts with the quality authorizing practice. In this case, the authorize should receive a "No" designation.

The evaluation team shall include details in the appropriate section of the rubric explaining the rationale behind the designation and will note where there is misalignment between the standard, the authorizer's documentation, schools' responses and authorizer commentary. See Table A. with an example of a completed rubric for one standard.

Table A. Example of a completed Georgia Authorizer Evaluation Rubric for one standard

Standard 2. Financial Resources. The authorizer allocates the required financial resources to support charter schools and provides transparency on the availability and allocation of charter school funding. Pursuant to O.C.G.A. § 20-2-2068.1 and O.C.G.A. § 20-2-2089

Evaluation Criteria	Documentation Review	Authorizer Debrief	School Survey	Met Criteria? (Y/N)
---------------------	-------------------------	-----------------------	---------------	---------------------------

 Appropriately publishes and shares calculation of earning for each charter school in accordance with law, specifically: GaDOE/SBOE/SCSC- district allotment sheets Local Districts- allotment sheet itemizing the calculation of state, local and federal allocations to be provided. 	Authorizer has posted to website under financial reports	Authorizer descried a reasonable timeline for annually publishing.	School did not respond with conflicting or negative information.	Y
Withholds no more than the legally allowable administration fee	As demonstrated on financial statements	Affirmed	Affirmed	Y
Publishes a budget that explicitly addresses how revenues are commensurate with expenditures related to actual administrative services provided to the charter school	Budget was submitted, but not published on website	Authorizers description of services to schools was unclear	School suggested that the authorizer over allocates monies to administrative tasks.	N
Number of Criteria Met:	Needs Improvement (NI)	Adequate (A)	Exemplary (E)	Rating
	0-1	2	3	Α

Rating the Standard: Every authorizer is assigned a rating of Needs Improvement (NI), Adequate (A) or Exemplary (E) on each of the 15 standards. The number of evaluation criteria met determine the authorizer's rating. Each standard has a different number of associated evaluation criteria. Thus, the number of criteria required to earn a particular rating varies from standard to standard as illustrated within the GAE Rubric, see Table A above as an example. However, there are some consistencies. An authorizer that met no criteria will always earn a Needs Improvement rating for the relevant standard. An authorizer that met all criteria will earn an Exemplary rating for the relevant standard.¹

Overall Rating: In addition to receiving a rating on each standard, every authorizer is assigned an overall rating of Needs Improvement (NI), Adequate (A) or Exemplary (E). The overall rating is determined by the number of NI, A, and E ratings the authorizer received across all 15 Georgia Standards for Quality Charter School Authorizing as outlined in the table below.

OVERALL RATING	
Rating	Criteria
Needs Improvement (NI)	Earned a majority (8 or more) NI ratings across all standards
Adequate (A)	Earned any combination of ratings across standards expect as designated for NI or E
Exemplary (E)	Earned a majority (8 or more) E ratings and no NI ratings across all standards

Districts in their first year of authorizing will receive a rating for each standard but will not receive and overall rating. Instead, they will be designated as a First Time Authorizer (FTA). This provides a route for improvement before being subject to the consequences related to receiving an overall rating of Needs Improvement. Per Georgia law § 20-2-2063.3, a charter school authorized by a local board of education that fails to meet the principles and standards of charter school authorizing on its annual evaluation for two consecutive years may petition to transfer its charter

¹ The one exception is if there is only one evaluation criteria associated with the given standard then the authorizer will earn the Adequate rating.

authorization to the SCSC. An overall rating of Needs Improvement is the evaluation process equivalent to failing to meet principles and standards of charter school authorizing.

Evaluation Process

Overview

- Step 0: Orientation Training
- Step 1: Send out school surveys
- Step 2: Pull relevant documents from authorizer website
- Step 3: Send authorizers' list of outstanding relevant documents
- Step 4: Deadline all documents submitted
- Step 5: Individual team member document review- begin rubric draft
- Step 6: School survey follow-up update rubric draft
- Step 7: Authorizer Debrief update rubric draft
- Step 8: Individual team member rubric completion due date
- Step 9: Whole team rubric review and completion

Timeline:

The month prior to evaluation cycle: Orientation Training Evaluation Cycle:

Week One

- Day One- the evaluation team will send out school surveys and start pulling relevant documentation from authorizer websites.
- Day Three- the evaluation team will provide the authorizers with updated relevant documents list highlighting the outstanding documents.

Week Two

- Day Three Outstanding relevant documents are due by the close of business.
- Day Five- School survey responses are due

Week Three- Four

• Evaluation team members begin independent documentation review

Week Five

- Day One- School survey follow-up questions and authorizer debrief questions are due to assigned evaluation team member
- Day Two- Authorizer debrief questions are consolidated and school survey follow-up questions are consolidated and sent to the school representative

Evaluation Team Lead: One member of the evaluation team will be designated as the lead for each authorizer. This can either be the same person on the team or all authorizers or different members of the team can serve as lead for different authorizers. The team lead is responsible for communicating with the authorizer and the authorizers charter schools. This person will be responsible for sending the updated relevant documents table to the authorizer after the initial website pull has been conducted, consolidating the evaluation team's school survey follow-up questions, consolidating the evaluation team's authorizer debrief questions, leading the authorizer debrief conversation and drafting the final version of the evaluation rubric.

Orientation: In the month prior to evaluations, the Georgia Department of Education (GaDOE) will provide an orientation training for authorizers regarding the standards, ratings, documents and evaluation process. A schedule of the evaluation process including timelines and due dates will be provided to authorizers and school leaders.

School Surveys: All approved (operational and pre-opening) charter schools will be asked complete an authorizer evaluation survey. The survey questions align with standards and evaluation criteria included in the Georgia Authorizer Evaluation Rubric. The survey is an opportunity for schools to explain their experiences with the authorizer and identify areas of strengths and weaknesses. The survey may require schools to submit documentation to support claims in the survey responses.

Documentation Collection: The evaluation team will make every effort to locate documents that are required to be posted on the authorizer's website. After the initial website collection phase, the evaluation review team will provide the authorizer an updated list indicating which documents from the Relevant Documents Table are still outstanding. The authorizer is required to submit all remaining documents and, if applicable, a link to where the document is publicly available.

Independent Documentation Review: Each member of the evaluation team will individually complete an evaluation rubric for each authorizer, identifying areas of misalignment between the standard quality practice as defined in the rubric, the authorizer documentation and school feedback from survey responses. Each team member will craft a list of follow-up questions they would like to ask the school, if applicable. Specifically, this occurs when school answered negatively regarding its authorizers' practice but did not provide a rationale or documentation supporting the response. Additionally, each team member will individually craft a list of follow-up questions they would like to ask the authorizer. Specifically, this occurs when the documentation submitted is unclear, incomplete or inconsistent.

School Survey Follow-up: One member of the evaluation team will consolidate all team members follow-up questions, removing duplicates, related to the schools' surveys for each authorizer. They will reach back out to the school for additional information, consolidate the schools' additional responses and send them back to all team members. Each team member will then make notes to their GAE Rubric and update ratings if needed.

Authorizer Debrief: One member of the evaluation team will consolidate all team members follow-up questions from the individual documentation review and will lead the conversation. The authorizer debrief is an opportunity for the authorizer to identify how the documentation submitted aligns the criteria and standards in the rubric. The review team will provide an opportunity for the authorizer to verbally explain processes and protocols. Additionally, this is an opportunity for the authorizer to respond any concerns derived from relevant school survey responses. The review team will consider both the quality of the submitted documentation and the authorizer's explanation. Verbal explanations should corroborate documentation content. The review team will note where misalignment occurs.

January 26, 2022

Dr. Peter Bluestone and Nick Warner

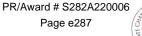
Economic Impact of Start-up Charter Schools in Georgia

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Economic Impact Study Research Questions

The State Charter Schools Commission of Georgia commissioned Georgia State University Center for State and Local Finance to research the following questions.

Do charter schools provide economic benefits to:

- Students who attend them?
- Communities they serve?
- Georgia?





Structure of Research to Date

- Report 1: Broad review of the existing literature on the economic impacts of charter schools, including academic achievement - 2016
- Report 2: Economic impact of start-up charter schools on the communities they serve through changes to property values - 2016
- Report 3: Economic impact that start-up charter schools have on students' academic milestones – 2017
- Report 4: Economic Impact that start-up charter schools have on the students' future wages - 2021



Report 1: Review of the Literature

Researchers reviewed literature available nationally to glean common findings among researchers.

Results:

- Tests scores most studied mixed results
 - Achievement across multiple schools have found no, small positive, or even small negative effects of charter school enrollment.
- Student achievement improves as charter schools mature
- Studies also have documented student achievement gains in urban charter schools that employ an education model known as No Excuses
- Recent literature provides evidence that charter schools have been able to improve student life outcomes, including high school graduation rates and earnings

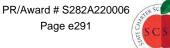




Report 2: Economic Impact That Charter Schools Have On Property Values - 2016

Researchers analyzed the variation in sales prices of houses in different attendance zones, as well as the variation in house values based on the distance from the charter schools. Where appropriate, the researchers also analyzed the differences in house prices before and after the opening of a start-up charter school. The majority of the 52 schools examined are located in large suburbs and cities, with 28 located in metro Atlanta.

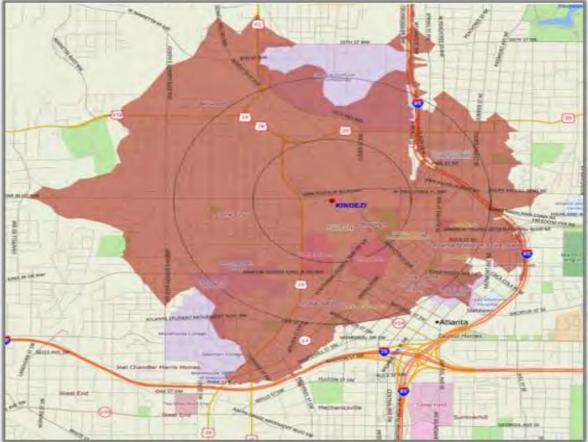
- Data: Rich data set that includes over **1 million home sales from 2004-2013**
- Sales include 15 school districts and 52 start-up charter schools
- Study relies on a fixed effects design to control for unobserved neighborhood effects

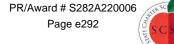






Report 2: Five-minute Drive Time Distance in an Atlanta Urban Area and Half-mile and One-mile Rings



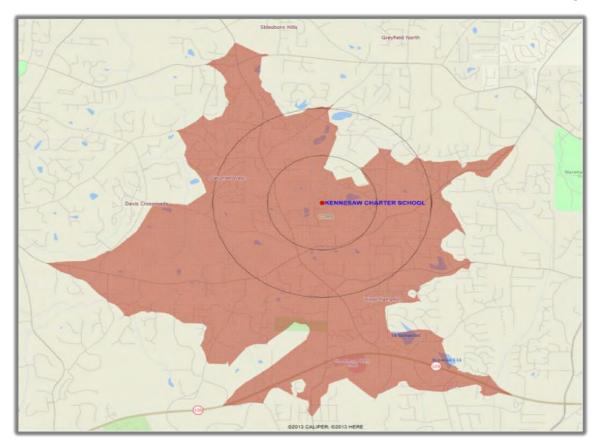


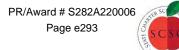
eorgia<mark>State</mark> ANDREW YOUNG SCHOOL University. center for state & local finance

Georgia<u>State</u>



Report 2: Five-minute Drive Time Distance Suburban Atlanta Area and Half-mile and One-mile Rings





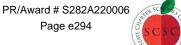


Report 2: Results - 2016

	Atlanta City Start-Up Priority Zone Only	Atlanta City Start-Up Non-Priority Zone Only	Atlanta Suburb Start- Up Non- Priority Zone Only
Concentric Ring Distance			
Within 0.3mi v 0.3mi-0.6mi	0.0816**	0.0193	NA
Within 0.5mi v 0.5mi-1mi	0.0802***	-0.0909*	0.0423***
Within 0.7mi v 0.7mi-1.4mi	0.0112	-0.0692*	0.0601***
Within 0.9mi v 0.9mi-1.8mi	NA	NA	0.0263**

*** p<0.01, ** p<0.05, * p<0.1

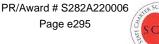
Source: CoreLogic home sales 2004-13 and authors' calculations





Report 2: Results Summary 2016

- In the city of Atlanta, priority-zoned charter schools increased property values by 8.2 percent within a 0.3-mile radius, with the average home expected to sell for \$11,846 more than the same home 0.3 - 0.6 miles away.
- In the Atlanta suburbs, non-priority charter schools increased property values by 4.2 percent within a half-mile radius, with the average home expected to sell for \$5,888 more than the same home located a half mile to one mile away.
- Source: CoreLogic home sales 2004-13 and authors' calculations

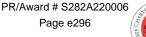






Report 3 (2017): Start-up Charter School Impact on Academic Milestones and Lifelong Success

- The report uses Georgia's Academic and Workforce Analysis and Research Data System, or GA AWARDS, information to analyze whether there is a causal relationship between attending a Georgia start-up charter school as a ninth-grader and achieving critical academic milestones often linked to future labor market success.
- The study compares start-up charter school students with those who previously attended a start-up charter school but switched to a traditional public school in ninth grade.







Report 3: Student Counts & Milestone Attainment Dates - 2017

School Year	8th Grade Cohorts* Start-Up Charter		Bachelor's Spring/ Wages Summer**
2006-2007	835	2011	2015
2007-2008	1,337	2012	2016
2008-2009	1,473	2013	2017
2009-2010	2,425	2014	2018
2010-2011	2,084	2015	2019
2011-2012	3,339	2016	2020

* Non-duplicated student count of 8th grade students.

**8th grader completing high school and a bachelor's degree in eight years could start working with a four-year degree the summer of this year. Source: GA•AWARDS Data

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Report 3: Treatment and Control Cohorts and Milestones Attained -2017

8th Grade Cohort	Control*	Treatment**	High School Grad. 5 yrs.**	2 Cons. Sem. Coll. 7 Yrs.**
2007	694	141	65%	57%
2008	1,223	114	62%	53%
2009	1,263	210	69%	57%
2010	1,976	449	56%	45%
2011	1,372	712	70%	52%
2012	2,267	1,072	56%	NA

*Control are 8th grade start-up charter school students that go on to attend a traditional public school or conversion charter school for 9th grade.

**Treatment are 8th grade start-up charter school students that go on to attend a start-up charter high school for 9th grade.

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Summary Statistics for Treatment and Control Cohorts

	Treatment and Control Means after Matching		Standardized Percent Difference in Means**	
	Treatment	Control	After	Before
8th Grade Means	Cohort	Cohort	Matching	Matching
Math Score	792.29	779.70	0.08%	10%
Percent Free				
Lunch	0.61	0.54	-0.32%	14%
Percent Gifted	0.03	0.11	0.00%	-31%
Percent Black	0.47	0.53	0.32%	-12%
Percent Hispanic	0.03	0.07	-1.43%	-20%
Percent White	0.45	0.34	0.08%	23%

Other Matching Criteria: English Score, Reading Score, Percent Limited English Proficient

**Standardized percent difference takes into account the standard deviation of the means. Source: GA•AWARDS data and author's calculations

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Reports 3 & 4: Results for Educational Milestones

Report 3 (2014)

				College		
	High School		College	Degree or		
VARIABLES	Diploma	College Ever	Persist.	Certificate		
Start-up Charter Ninth Grade	0.0421***	0.0582***	0.0756***	0.0229*		
	(0.0148)	(0.0191)	(0.0236)	(0.0125)		
Observations	5,072	3,024	1,692	1,692		
Report 4 (2021)						
Start-up Charter Ninth Grade	0.0700***	0.0889***		0.0602***		
	(0.0184)	(0.0208)		(0.0175)		
Robust standard errors in parentheses						

*** p<0.01, ** p<0.05, * p<0.1

Source: GA•AWARDS data and author's calculations



Report 3 and 4: Results Summary

Comparing the two groups of students, the results show start-up charter school pupils were:

- 7 percentage points more likely to graduate from high school
 - Up from 4 percentage points in report 3
- 9 percentage points more likely to enroll in college
 - Up from 6 percentage points in report 3
- 8 percentage points more likely to persist in college for two consecutive semesters (data here is only for report 3)
- 6 percentage points more likely to earn a college degree or certificate
 - Up from 2 percentage points in report 3

Source: GA•AWARDS data and author's calculations





Report 4: Treatment and Control Cohorts and Observed Georgia Wages – 2021

	Total Count		Georgia Wages***	
8th Grade				
Cohort	Control*	Treatment**	Control*	Treatment**
2007	749	168	460	105
2008	1222	147	595	102
2009	1576	224	806	159
2010	1209	280	762	185
2011	1307	399	913	304

*Control are potential control students who attended eighth grade start-up charter schools. Eight grade treatment and control cohorts do not equal 8th grade cohorts in table 1 due to missing test scores or other data that do not allow for matching.

**Treatment are eighth grade start-up charter school students that go on to attend a start-up charter high school for ninth grade.

***Wages for that student included indicating Georgia employment.

Source: GA•AWARDS data

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Report 4. Summary Statistics for Treatment and Control Cohorts - 2021

	Treatment and Control Means after Matching		Standardized Percent Difference in Means**	
	Treatment	Control	After	Before
8th Grade Means	Cohort	Cohort	Matching	Matching
English Score*	0.63	0.60	0.04	0.13
Math Score	0.60	0.56	0.04	0.14
Reading Score	0.62	0.60	0.02	0.08
Free Lunch	0.63	0.64	-1.7%	-13.0%
Gifted	11.9%	11.9%	0.00	0.00
Limited English Proficient	0.97%	0.97%	0.0%	-1.3%
Black	56.5%	56.2%	0.7%	-21.3%
Female	55.4%	56.0%	-1.3%	0.0%

*Test scores have been normalized within year and test relative to a distribution with a mean zero and standard deviation of one. This normalization was necessary because of changing testing regimes over the period.
 **Standardized percent difference takes into account the standard deviation of the means.

Source: GA•AWARDS data and author's calculations



Report 4: Georgia Wages

VARIABLES	Quarterly Wages
Start-up Charter Ninth Grade	536.5*
	(275.5)
Observations	1,232
Pobust standard arrors in parantha	505

Robust standard errors in parentheses

*** p<0.01, ** p<0.05, * p<0.1

Source: GA•AWARDS data and author's calculations



Report 4: Georgia Wages Results Summary and Concerns

- Students that attend start-up charter 9th grade: \$538 additional wages per quarter
- Findings are positive at the 90 percent level
 - Checking other specifications within these control/treatment cohorts for robustness
 - findings can turn to zero
- Limited confidence from lack of observations or small effect?
 - New specification based on all Georgia 9th graders to test this question
 - Down side: potential selection bias



Report 4: Georgia Wages - Alternative

VARIABLES	Quarterly Wages		
Start-up Charter Ninth Grade	810.0***		
	(268.2)		
Observations	64,113		
Robust standard errors in parentheses			
*** p<0.01, ** p<0.05, * p<0.1			
Source: GA•AWARDS data and author	or's calculations		

 Start-up 9th grade students compared to 9th grade student estimated to have similar probabilities to attend charter schools but live in a zip code without access to start-up charter schools

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Summary: Average Economic Benefits for Communities and Students Served by Start-up Charter Schools

Economic Impact of Start-up Charter Schools

- Atlanta Homes Priority Zone \$8,372
- Atlanta Homes Non-Priority Zone \$5,972
 Economic impact on wages for the students
 that attend start-up charter 9th grade
- \$538 additional wages per quarter

Summary: Other Related Economic Benefits for Communities and Students Served by Start-up Charter Schools

Wage premium relative to no high school diploma per year

•	High School Diploma	\$9,000
•	Associate's Degree	\$13,650
•	Bachelor's Degree	\$30,650

Other benefits to State and Local Governments

- Higher wages lead to lower spending on public assistance programs
- Higher educational attainment lead to lower rates of incarceration





Thank you!

Peter Bluestone

pbluestone@gsu.edu

Check out our research at cslf.gsu.edu or on social media

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SEPTEMBER 29, 2016

THE CENTER FOR STATE AND LOCAL FINANCE

Review of Charter Schools' Effects on Student Achievement and Life Outcomes

Peter Bluestone David Sjoquist Nick Warner



ANDREW YOUNG SCHOOL CENTER FOR STATE & LOCAL FINANCE

About the Report

This is the first in a three-part series of studies commissioned by the State Charter Schools Commission and performed by the Center for State and Local Finance that analyze the economic impact of start-up charter schools on the communities they serve and on the state of Georgia as a whole. This initial report summarizes the academic literature on the impact of charter schools on academic development and achievement. The second report will examine the economic impact of start-up charter schools on the communities surrounding them by analyzing the effects on real property values. The third report will use administrative data from Georgia's schools and government agencies to show the effect of start-up charter schools on academic achievement, the labor market, and the economic impact thereof on their communities. Examining the economic impact of charter schools on their communities has been previously undertaken in only a few other states. This series of reports, focusing on the Georgia experience with start-up charter schools, aims to make a meaningful contribution to this literature.

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Introduction

Since the first charter school opened in 1992, 42 states and the District of Columbia have adopted provisions allowing charter schools (Epple et al. 2015). Advocating reform to struggling public education systems, the proponents of charter schools envisioned that charter schools' autonomy would allow charter schools to innovate and improve educational outcomes for their students. Proponents also hoped that the increased competition for students would spur improvements in traditional public schools (TPS). Improved academic performance is important as research has generally found that it leads to better economic outcomes for both individuals and communities (Hanushek and Kimko 2000; Card 1999).

The effect of charter school attendance on student academic achievement and life outcomes has been long debated and extensively researched, with research conducted in at least 27 states (Cremata et al. 2013). Most commonly, researchers have used changes in tests scores to measure student achievement, yielding mixed results: Studies estimating changes in student achievement across multiple schools have found no, small positive, or even small negative effects of charter school enrollment.

Evidence within many of these studies, however, indicates that student achievement improves as charter schools mature (Sass 2006; Bifulco and Ladd 2007; Booker et al. 2007). Studies also have documented student achievement gains in charter schools that employ an education model known as No Excuses (Hoxby and Murarka 2009; Gleason et al. 2010; Angrist et al. 2013). While not a rigidly-defined model, the No Excuses approach includes a strict disciplinary environment, longer school days and school years, and a focus on traditional reading and math; the schools employing this approach are typically in urban areas.¹ Our analysis of 50 start-up charter schools in Georgia had mixed results regarding the effects of charter schools on student achievement, mirroring the national literature.

In order to compare test scores across students, researchers commonly examine oversubscribed charter schools. They analyze the differences between students who "won" the enrollment lottery and attended the charter school and students who "lost" the lottery and attended a TPS. Because winning and losing the enrollment lottery is random, any difference in the academic performance between the lottery winners (who are charter school students) and losers (who are TPS students) can be considered causal. The results from the lottery studies alone, however, may be too narrow to apply to all charter schools (Angrist et al. 2013).

In addition to studies of academic performance, an emerging literature is providing some evidence that charter schools have been able to improve student life outcomes, including high school graduation rates and earnings (Booker et al. 2007; Dobbie and Fryer 2013; Booker et al. 2014; Fitzgerald 2014).

¹ A growing body of literature has termed the approach of these schools as "No Excuses." There is not a strict definition of what is included in a No Excuses school. However, they share many similar characteristics. Later in this report, we list the characteristics we use to define No Excuses schools in Georgia.

The report is organized as follows. The next section discusses the theory that education can increase human capital and lead to positive economic impacts for communities and individuals. The third section summarizes key literature on charter schools and the importance of rigorous research methods when examining charter school effectiveness. Section four examines various measures used to gauge the success of charter schools, including student achievement, high school graduation rates, college attendance rates, and earnings. Section five reviews these student outcomes in relation to Georgia's current charter school landscape. For this section, we use results from the Governor's Office of Student Achievement (GOSA) evaluation of some of the state's charter schools with additional information about 50 Georgia start-up charter schools. Section six examines other economic benefits associated with better educational outcomes. The final section concludes the report. The Appendix provides a summary of the relevant high-quality empirical studies on the effectiveness of charter schools.

Δ

The Economic Theory on Academic Achievement and Economic Impact

Economic theory holds that increased business investment in new machines and equipment (capital investment) fosters economic growth. Becker (1962) expanded the concept of investment to include schooling and training (investing in human capital). This theory states that better educated workers are more productive; this can lead to both economic growth, improving the larger economy, and higher wages, an economic benefit to individuals.

Since Becker published his article, the literature on human capital has expanded extensively and fits into two broad categories: the macroeconomic effects of education on countries' growth rates and the returns to earnings from education for individuals. While both of these areas of research have been fraught with debates about appropriate research methods, there is consensus on two outcomes. First, in the macroeconomic setting, better schooling, measured by cognitive development in a country, is related to greater economic growth (Hanushek and Kimko 2000; Hanushek and Woessmann 2012). Second, from the perspective of individuals, higher educational attainment leads to substantially higher lifetime earnings (Card 1999; Heckman et al. 2006).

In the wake of Becker's seminal article on how earnings can grow through the investment in human capital, Jacob Mincer (1974) formulated a model that explains earnings as a function of experience and education, while controlling for other factors that might affect earnings. The resulting Mincer regression equation is widely used by labor economists to measure the monetary returns from additional years of schooling. According to Thomas Lemieux (2006), the Mincer model "has been estimated on thousands of data sets for a large number of countries and time periods which clearly makes it one of the most widely used models in empirical economics."

While a useful tool for economists, the Mincer equation has its critics who argue that the model is overly simplistic. Nobel Prize-winning economist James Heckman, who is a leader in this area of research, was an early critic (Heckman and Polachek 1974). The principal concern is that education and ability are

correlated, so it is difficult to identify which of these two factors determines earnings. The most current literature on the relationship between educational attainment and earnings suggests that it is complicated to model but that the effect of education on earnings is nevertheless consistently positive (Heckman et al. 2015). Heckman asserts that sophisticated average treatment effect models are required to accurately identify the causal effect that education has on earnings.² In addition to considering a person's educational attainment, these models must also account for different levels of inherent skills and abilities and the sequential education decisions process that individuals face.³ The models must also accurately account for the uncertainty associated with all of these decisions. For instance, there is a level of uncertainty present when a person makes a decision to obtain a college degree: She might not complete the degree, and therefore not receive the expected increase in wages associated with that degree. Despite its complexity, the Heckman model estimates of the returns to education are similar to those found using the Mincer equation. Heckman finds that for each additional step in educational attainment, such as earning a high school diploma, earnings increase by roughly 10 percent per year. (Note that this causal relationship also holds for additional milestones such as attending college and earning a college degree.)

It is important to note that recent studies such as Heckman et al. (2015) use sophisticated statistical techniques to prove that additional educational attainment is the causal agent responsible for improved earnings or other outcomes of interest. However, many empirical studies simply report the correlation between educational attainment and various outcomes but do not show that education is the actual cause of the outcome. For instance, an extensive literature documents the correlation between educational attainment and better life outcomes, such as health status, and societal benefits such as lower take-up rates of public assistance, lower incidences of crime and lower incarceration rates.⁴ Later in this report, we discuss this literature. We next examine studies that have looked for causal connections between charter school attendance and factors associated with community economic impact, including academic achievement.

Charter Schools: Research Methods Employed

Isolating a causal relationship between the charter school that students attend and outcomes of interest, such as academic achievement and their future earnings, is difficult. Differences among individual charter schools, such as the legal framework in which they operate, curricular focus, instructional style, teachers,

² Much like a laboratory experiment, average treatment effects are determined by using a control group and a treatment group to measure outcome differences between those who received the experimental treatment and those who did not. In this type of research, an individual's level of education serves as the treatment in this experimental approach (Heckman et al. 2015).

³ The choice by individuals to pursue additional education is modeled as a decision tree in which each decision offers an additional branch with additional choices. As in real life, the model requires that a student complete the prior level of education before she can choose to go on for additional education. For instance, the choice to attend college is conditional on the student's choice to complete high school.

⁴ Many of these results can be attributed to the studies done on children in Chicago who participated in various early childhood programs. A widely known example of this research is the *HighScope Perry Preschool Study, Lifetime Effects: The HighScope Perry Preschool Study Through Age 40* (see Schweinhart et al. 2005).

schedules, and communities served, complicate the analysis. Because of these variations, much of the research on charter schools has been specific to one school or small set of schools within a given state, making it difficult to generalize the findings to other charter schools.

When comparing the outcomes of students who attended a charter school to those who attended a TPS, the research suffers from potential sample selection bias. By choosing to enroll, or attempting to enroll, in a charter school, a family and student are indicating intrinsic motivation and potentially higher value placed on education than families and students who do not attempt to enroll. Any effect found in a study that does not correct for this potential selection bias could just be capturing the effect of the higher levels of motivation and value placed on education rather than the charter school's impact on the student.

The extant research on charter schools has used multiple research methods to account for this potential selection bias. The method selected varies depending on the outcome being measured and the type of data available.⁵ Ideally, researchers would be able to select students and randomly assign them to a charter school or a TPS, and then observe the differences in outcomes. However, that is not possible. The next best real-world alternative is referred to as a lottery-style research design. This research design takes advantage of the random selection that an attendance lottery provides in oversubscribed charter schools. Researchers are able to address selection bias by comparing the performance of students chosen for the charter school to that of students not chosen and who were not chosen and consequently attend a TPS. Thus, the comparisons of student outcomes only take place among individuals who wanted to attend that school, and as both groups are presumably similarly motivated, any difference can be attributed to the effect of attending the charter school.

Attrition poses a potential complication for lottery-based studies, if that attrition is related in some way to the results of the lottery. For example, students that move away or attend a private school after not getting a spot in the charter school would not be observed after the enrollment lottery occurs. If this decision is related to the results of the lottery, then it could bias the results since the comparison group would not necessarily be reflective of lottery losers. Researchers have found differences when comparing the population of students that leave the system after unsuccessfully participating in the lottery versus those that stayed in the system after unsuccessfully participating in the lottery. Some studies have also found significant differences in the group of students that were observed before the lottery. Researchers can correct for the effect of such attrition, but at the cost of less precise estimates (Angrist et al. 2010; Engberg et al. 2014).

By design, the lottery research method can only evaluate the performance of oversubscribed schools, and thus results may not be generalizable to all charter schools. The oversubscription of these schools

⁵ An excellent survey of all of the academic literature on charter schools, and the various statistical methods used to correct for selection bias, was recently conducted by Epple et al. (2015). They identified five methods used to correct for this potential bias: 1) fixed effect approaches, 2) a random lottery design, 3) matching procedures, 4) an ordinary least squares (OLS) regression design, and 5) instrumental variable approaches.

suggests several important limitations to the application of the research to other charter schools. First, these charter schools may be oversubscribed because they are of high quality relative to other charter schools. Second, the strong demand may indicate that the area's public schools are of low quality and the charter school option presents only a marginal improvement. Third, a combination of reasons one and two is also possible. A final criticism of lottery-based studies is that two key assumptions are embedded in the research design: The lottery conducted was in fact random, and the records kept by the schools are accurate (Clark et al. 2011). Despite these criticisms, most lottery studies have high internal validity, meaning we can have confidence in the results for that individual school, but at the cost of external validity, meaning we might not be able to generalize the findings to all charter schools.

Lottery-style studies are not always practical for various reasons, such as the schools of interest are not oversubscribed or lottery results are not available. Another method that researchers have used to measure the effect of charter schools on educational outcomes is to compare the achievement of students who started out in a TPS and then moved to a charter school. This type of historical data, commonly referred to as longitudinal data, allows researchers to control for selection effects and other unobserved characteristics because the research design relies on the changes in educational attainment of individual students over time. This research design uses a statistical method known as fixed effects, which is a way of controlling for unobserved individual characteristics that do not change (remain fixed) over time.

While the fixed effects research design allows a broader array of charter schools to be studied, it too has some strong critics. Some have argued that the assumptions inherent in running fixed effects models are overly restrictive and poorly suited to finding a charter school effect. These studies rely on students who switch schools, who as a group might not accurately represent the population of charter school students and thus bias the results (Hoxby and Rockoff 2004). In addition, there are a limited number of these students, and the requirement that these students be administered at least two standardized tests while in TPS further shrinks the sample size. This smaller sample size limits the statistical power of these studies to find charter school effects on student achievement (Hoxby and Murarka 2007).

In an attempt to overcome the criticisms leveled at both lottery studies and fixed effects studies, the National Center for Education Evaluation and Regional Assistance (NCEERA) designed and funded an ambitious study that encompassed 36 charter middle schools in 15 states (Gleason et al. 2010). The researchers recruited established charter schools and were involved in all facets of the enrollment lottery process, verifying that it was random and that the data generated from it were accurate. Because the study was conducted across several states and covered both urban and nonurban charter schools, the results are more broadly applicable than previous lottery studies. The NCEERA study produced several interesting results, including differences in the performance of urban and nonurban charter schools in academic achievement. The findings of this study were important in guiding subsequent research on charter schools. Subsequent studies have tried to isolate and identify the source of the disparate effects found between urban and nonurban charter schools. We discuss these findings in greater detail later.

A variant of the fixed effects study design is often referred to as the value-added model. The value-added model uses a student's prior test scores and demographic characteristics to predict future test scores. Researchers use the difference between the actual test score and the test score predicted by the model as a measure of the charter school's contribution to student achievement. To evaluate the value added for a whole school, the difference between the actual and predicted test scores are averaged for each student. This method is currently being employed in Georgia by Dr. Tim Sass for GOSA (Sass 2014).

Charter Schools: Measures of Success

This section explores the empirical literature on charter schools' effects on academic achievement, graduation rates, wages, and other life outcomes. The discussion is limited to high-quality studies that use the methods discussed in the previous section. For charter schools to have a measurable economic impact, they need to improve outcomes for students later in life. Charter schools that increase the number of students who graduate high school, attend college, obtain degrees and earn higher salaries would have positive economic impacts on their communities. A recent stream of the literature examines the potential effects that charter schools have on these outcomes. There is a much more established literature that examines the role that charter schools play in academic achievement. We examine that literature first.

ACADEMIC ACHIEVEMENT

An extensive body of work explores the effects that charter schools have on academic achievement, as measured by performance on standardized tests. This rich literature has measured charter school effects on academic performance at the elementary and middle school levels.⁶ Student achievement has been firmly linked to better life outcomes such as increased high school graduation rates and higher wages; consequently, the effects found in this literature are a reasonable stepping stone for better economic outcomes for students later in life.

In much of the earlier literature, the research design implemented often predicted a study's findings. For example, studies that relied on a fixed effect design tended to not find an effect of charter school attendance on academic achievement, or even to find a small negative effect. Lottery-style research designs, in contrast, tended to find large positive effects. However, a consensus is forming among researchers that one educational model, No Excuses, employed by charter schools predominantly in urban districts serving disadvantaged students is positively linked to educational outcomes.

The early published literature testing for a causal relationship between charter enrollment and student achievement addressed selection bias by relying on student-level longitudinal data. These studies are commonly referred to as fixed effects studies. Charter schools in at least 12 states have been studied

⁶ The literature on student achievement does not include nearly as many studies on charter high schools, as they are not as numerous as charter elementary schools and middle schools, nor have they been in existence as long. Thus, there are limited cohorts of students to study.

using the fixed effects design, with findings generally showing that charter school enrollment had little to no effect on student achievement compared to TPS (Zimmer and Buddin 2006; Booker et al. 2007; Hanushek et al. 2007; Imberman 2011, Ni and Rorrer 2012; Zimmer et al. 2012; Booker et al. 2014). In a set of studies using charter school data from North Carolina, Bifulco and Ladd found that charter school attendance had consistently negative effects on reading and math test score growth rates (Bifulco et al. 2004; Bifulco and Ladd 2006, 2007).

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Despite a lack of support for improved student achievement in general, some studies have found that charter schools become more effective over time (Sass 2006; Bifulco and Ladd 2007; Booker et al. 2007; Hanushek et al. 2007; Ni and Rorrer 2012; Cremata et al. 2013). For example, Sass (2006) found that Florida charter schools initially underperformed TPS, but by their fifth year in operation, they had closed the performance gap in math and were outperforming TPS in reading.

One of the most extensive studies of charter schools to date was published in 2013 by the Center for Research on Education Outcomes (CREDO) at Stanford University. The study was in part a follow-up to a 2009 national study that covered 16 states plus Washington, D.C. By comparing 2013 results to the 2009 results, the authors found, like Sass (2006), that as charters mature, their students' academic achievement tends to improve.

In contrast to the results of fixed effects studies, lottery-style studies have consistently found that charter schools improved student achievement (Hoxby and Rockoff 2004; Hoxby and Murarka 2009; Abdulkadiroğlu et al. 2011; Dobbie and Fryer 2011; Dobbie and Fryer 2013; Curto and Fryer 2014). The effects in these lottery studies, which were conducted in Boston, Chicago, New York City, Washington, D.C., and Los Angeles, ranged from small to large positive effects for reading and math over TPS.

Because the scaling on test scores differs across tests, research on education reforms that consider the effect on test scores generally report results in terms of changes in standard deviation units. The standard deviation measures how dispersed the scores are, and thus indicates how large the change in the test score has to be for the result to be of significance. Suppose that one researcher found that an education reform implemented in one state increased the average test score by 60 points, while another researcher found that an alternative reform in another state that used a different test increased the average test score by 25 points. Those two score improvements are not comparable. But suppose that the standard deviations for the two tests are 600 and 100, respectively. For the first state, the reform increased test scores on average by 0.1 standard deviations (=25/100). Compared to the results of most reforms, an increase in average test scores of 0.4 standard deviations would be considered a large effect.

Some of the upper bound results come from the lottery-type studies, such as those conducted in Massachusetts on the Knowledge is Power Program (KIPP) schools (Abdulkadiroğlu et al. 2011; Angrist et al. 2010, 2013). These studies find that one year at a charter middle school improves student achievement in math by about 0.4 standard deviations and about 0.2 standard deviations per year in English/language arts (ELA). To get a sense of the significance of these effects, Sass (2014) compared them to other substantive education changes that have positive impacts on student achievement. For instance, reducing class size in elementary grades by seven students is associated with a 0.10 to 0.20 standard deviation increase in student achievement (Whitehurst and Chingos 2011), and the difference in the effectiveness of a first-year teacher and one with three years of experience is about 0.07 standard deviations (Dee and Wyckoff 2013). Note that it is difficult to compare results across studies because they vary by year, school and grade level. In addition, none of the studies of charter school's effectiveness cited here report the underlying test mean or standard deviation.

Clark et al. (2011) uncovered a key insight into why such large discrepancies have been found in the literature on the effects of charter schools on student achievement. They observed that there was a link between the geography of the areas and type of students served by charter schools and student achievement. On average, charter schools serving large urban areas or those serving lower achieving or more disadvantaged students had positive effects on student achievement. No such positive effects were found for charter schools in nonurban areas or those serving higher achieving or more advantaged students (Clark et al. 2011).

Researchers have conducted studies to try to discern what makes urban charter schools more successful than nonurban charter schools. The emerging consensus is that urban charter schools tend to use the No Excuses approach (Angrist et al. 2013). No Excuses schools are more likely to employ strict discipline, focus on traditional reading and math, have increased instructional time and have greater selectivity in teacher hiring. Many of the oversubscribed urban charter schools with lottery data are No Excuses schools (Hoxby 2003; Hoxby, Murarka et al. 2009; Angrist et al. 2010; Abdulkadiroğlu et al. 2011; Dobbie and Fryer 2011; Curto and Fryer 2014). Some urban charter schools have not implemented this instructional approach, which partially explains the wide range of estimated effects across urban schools. Note that in the various samples of charter schools used in the studies conducted to date, almost no nonurban charter school has adopted the No Excuses instructional approach (Gleason et al. 2010).

In an effort to explain this apparent divide between urban and nonurban charter schools in Massachusetts, Angrist, Pathak, and Walters (2013) used a lottery-style research design as well as several other empirical methods to analyze Massachusetts charter schools. By controlling for the No Excuses approach in the charter schools, the researchers were able to explain many of the dichotomous findings in the earlier literature between urban and nonurban charter schools. In addition, the researchers found that students with certain demographic characteristics benefited more from the No Excuses approach than others. In particular, urban charter middle schools appear to produce especially large achievement gains for students from low-income households and with low baseline test scores (Angrist et al. 2013).

The literature on charter school effects on student achievement has historically been contentious. In summary, much of the literature using the lottery method has provided strong evidence that certain charter schools are able to improve student achievement. However, when many schools that operate in varying contexts and areas are studied together, even when using the lottery method as Gleason et al. (2010) did, the effects on average tend to be small or zero. Research shows that this low average effect is due to the variability in measured effectiveness across schools. More recent studies that tried to uncover

the source of this variation suggest that No Excuses charter schools that serve disadvantaged students, typically in urban settings, do improve student achievement. Other types of charter schools have not been found to outperform TPS in any consistently measurable way.

GRADUATION RATES, COLLEGE ATTENDANCE, AND EARNINGS

Studies testing the effect of attending charter high schools on outcomes that directly relate to economic impact such as graduation rates, higher education outcomes and wage effects have all come since 2010. This is largely because the first classes of charter school students have only recently begun graduating from high school, so there are limited numbers of charter school alumni for which these outcomes can be measured. Researchers must observe charter students at some point after graduating high school, and even college, to test these effects. The student-level databases must also have been in place for a long period of time to both capture attendance at charter schools and observe the outcomes after high school graduation. The studies that have been able to do this type of analysis have found positive effects from the enrollment in a charter school on these three outcomes.

Some studies have found that enrollment in charter high schools increases the chances of high school graduation and college attendance (Booker et al. 2010; Clark et al. 2011). Unlike test scores, high school graduation and earnings immediately after graduation are one-time events, and any study of the effect that charter schools could have on them cannot rely on multiple observations for a student over time to help control for potential charter school selection bias. To account for potential selection bias, Booker et al. (2010) considered only students who had previously attended a charter middle school. In a follow-up study, similarly designed except with a matching protocol implemented to further correct for any charter selection bias, the authors found similar results for high school graduation and college attendance. In addition, they found that charter enrollment predicted longer college persistence and higher earnings (Booker et al. 2014).

Two lottery-style studies conducted on oversubscribed charter schools in Boston and Harlem found positive effects of charter enrollment on some non-cognitive outcomes (Dobbie and Fryer 2013; Angrist et al. 2014). In these studies, charter schools were found to increase the chances that a student would enroll in a four-year college rather than a two-year college, but they found no evidence that the charter schools increased the likelihood of high school graduation (Angrist et al. 2014). The students who attended Harlem's charter schools were more likely to enroll in college; female students were less likely to become pregnant as a teen; and male students were much less likely to be incarcerated than students who participated in the lottery but attended Harlem's TPS (Dobbie and Fryer 2013).

Studies that look at broader outcomes such as graduation rates and earnings are fairly recent and few in number, and include schools in only Chicago, New York, Boston and Florida. However, they might provide the best evidence that charter schools are having positive economic impacts on communities and individuals through improved academic achievement. The next section examines how the national literature relates to Georgia's experience with charter schools.

Georgia's Experience with Start-Up Charter Schools

In this section, we analyze the available data on the effectiveness of Georgia's start-up charter schools by comparing a select group of urban start-up charter schools that use the No Excuses model to nonurban schools and schools that do not use the No Excuses approach.⁷ As the national literature points to a link between No Excuses charter schools and increased student achievement, we would expect to find the same in Georgia's start-up charter schools. We categorized 50 start-up charter schools in Georgia as urban No Excuses or other; however, our analysis is limited to 11 schools as those were the only relevant start-up charter schools with available data.⁸

Our initial review suggests that in Georgia, those charter schools that outperform the state average tend to vary in their instructional approach, with some of the leaders employing No Excuses methods while others do not.⁹ The link between charter school academic achievement and the No Excuses approach will be examined further in our future report.

To assess whether the 50 start-up charter schools in Georgia could be categorized as No Excuses schools, we checked school websites and materials looking for the following characteristics that Angrist et al. (2013) identified as common among No Excuses schools.

- Uniforms
- Cold-calling on students in the classroom
- Use of instructional drills
- Extended instructional time
- Formal reward systems to shape student behavior
- Hiring Teach for America alumni
- Videotaping lessons to provide teachers with feedback
- Focus on discipline
- High-dosage tutoring

⁷ Start-up charter schools are schools that did not exist prior to being authorized as a charter school. This is in contrast to a conversion charter school, which is usually an existing TPS that is converted into a charter school. The length of operation of the start-up charter schools in this sample varies from over 10 years to just a couple of years.

⁸ According to the Georgia Department of Education Annual Charter School report, there were 87 charter schools in 2014-15. Schools were dropped that do not have defined attendance zones or are not start-up charter schools. This excluded career academies, non-traditional high schools, district operated schools, and state charter schools with a state-wide attendance zone. Schools that opened in 2014 or later were also not included due to lack of usable data. This process resulted in the full list of 52 start-up charter schools compiled by the Center for State and Local Finance and the State Charter School Commission for additional research on the economic impacts of charter schools to be conducted in a future study. Two of the schools on that list have recently closed, leaving 50.

⁹ The state average includes both charters and traditional public schools, though there are many more traditional public schools than charters.

Angrist et al. (2013) also suggested that No Excuses charter schools do not usually engage in some activities, including:

- Emphasizing social and physical well-being or cultural awareness; and
- Using group projects.

Seven out of the selected 50 Georgia start-up charter schools meet many of these criteria and are all KIPP schools. Thirteen additional schools have some of the criteria and may lean toward the No Excuses model.¹⁰ For the remainder of this report, we categorize all 20 schools as No Excuses schools. The remaining 30 schools did not meet the No Excuses criteria or used teaching practices inconsistent with the No Excuses model.

The achievement outcomes for some of the 50 start-up charter schools above was examined in the recent GOSA studies conducted by Sass. GOSA has issued three reports documenting the achievement of students in 14 state charter schools (Sass 2014, 2015, 2016).¹¹ The two reports analyzed here are for school years 2012-13 and 2013-14 and include charter schools that serve elementary, middle and high school grades.¹² The reports conclude that in aggregate the charter schools did not have higher student achievement than the Georgia state average, as measured by scores on standardized tests. However, there is variation among the schools and across the subjects tested.

Included in the 14 examined schools are 11 start-up charter schools.¹³ We categorized six of those 11 schools as No Excuses schools; they generally serve urban areas that include disadvantaged students. (Three are Ivy Prep schools, and none in this 11-school sample are KIPP schools.) The remaining five schools are nonurban and do not have attributes of the No Excuses model.¹⁴

Many of the charter schools are comprehensive and include grades K-8 and beyond. In these cases, the elementary and middle school test scores are reported separately in the GOSA reports; it is possible for the elementary school test scores to exceed the state average and not the middle school scores or vice versa. Thus, comprehensive charter schools that include elementary and middle school grades are treated as two schools for our purposes. This yields nine observations of No Excuses elementary and middle schools located in urban areas (No Excuses/urban) and 10 elementary and middle schools that did not fit the No Excuses model in nonurban areas (Other/nonurban), for a total of 19 observations.

¹⁰ Again, while there is no consistent definition of what the No Excuses model is in the literature, the schools share similar characteristics.

¹¹ State charter schools can be created if their petition was denied by a local board of education or if the school has a statewide attendance zone. A state charter school is authorized to operate by virtue of a charter contract with the State Charter Schools Commission.

¹² The third report was released in May 2016 for school year 2014-15, as this report was being written. The results are fairly similar to the two earlier reports and are not included here.

¹³ Three of the 14 are state-wide virtual schools and thus are not relevant for the analysis here.

¹⁴ There is geographical variation in the populations served by the five schools that we assessed that do not employ No Excuses methods. But, most serve populations outside of core urban areas, for instance in Coweta and Cherokee counties or the rural five-county attendance zone of the Pataula Charter School. For the simple analysis here we classify these five schools as nonurban.

		NO EXCUSES/ URBAN CHARTER SCHOOL		ONURBAN SCHOOLS
SCHOOL YEAR	2012-13	2013-14	2012-13	2013-14
Average (over all tested subjects)	3	1	4	2
Reading	4	7	8	10
Math	3	2	2	1
Number of Observations	9	9	10	10

Table 1. Selected Charter School by Type that Exceeded State Average Public School

Source: Sass (2014, 2015) and authors' calculations. Data on charter school attributes is available upon request.

Table 1 shows the number of the selected No Excuses/urban and Other/nonurban charter schools that exceeded the state average test scores as determined by Sass (2014, 2015) for two school years, 2012-13 and 2013-14 (the full sample is the 19 observations discussed above). Over all subjects tested, most of the selected charter schools did not do better than the state average in either year, but the results varied by subject tested. In addition, the selected Other/nonurban schools do not appear to induce greater student achievement than the selected Other/nonurban charter schools.

For illustrative purposes, we discuss the most recent year, 2013-14, again based on the 19 observations discussed above. For instance, of the nine No Excuses/urban schools, one school exceeded the state average in value added measures, as did two of the 10 Other/nonurban charter schools. Results vary across subjects, with the charter schools doing better in some subjects and worse in others than the state average. For instance, in reading, seven of the nine No Excuses/urban charter elementary and middle schools exceeded the state average and all of the 10 Other/nonurban charters did in 2014. However, the charter schools did worse than the state average in math, with only two of the nine No Excuses/urban schools.

The simple analysis shown in Table 1 suggests several areas of additional research that the Center for State and Local Finance will take up in a future report. Do urban charter schools generally have a greater impact on student achievement than nonurban charter schools in Georgia? How important is the No Excuses model in improving student achievement and other life outcomes in Georgia?

We next examine some additional economic benefits that are associated with improved academic achievement and higher rates of high school graduation.

Other Economic Benefits

As was discussed in the previous sections, charter schools can have a positive effect on academic achievement, college attendance, wages and other important young adult life outcomes. Many studies have found a correlation between better academic outcomes and many of these other outcomes. It is important to note that these studies produce simple bivariate correlations and thus do not control for other factors. We briefly explore some of these benefits and how individuals, as well as state and local governments in Georgia, might benefit from better and more education.

Charter school attendance has been linked to increased graduation rates as well as a greater likelihood of attending college. Research by the Bureau of Labor Statics (BLS) shows that high school graduates report lower unemployment rates and have higher median earnings. For instance, the national median weekly earnings for workers with a high school diploma was \$668 in 2014 compared to \$488 for those with less than a high school diploma. College-educated workers had higher wages still, with the size of the difference depending on the degree earned. For those with a bachelor's degree, the national median weekly wage in 2014 was \$1,101. For those with an associate's degree, the national median weekly wage was \$761. Note that these results do not consider other factors that might affect earnings, such as ability, age, gender, race/ethnicity and health.

Several other benefits can be linked to higher academic achievement. Higher incomes result in lower spending on social assistance, which could benefit state and local governments. For instance, in 2012, BLS estimated that nationally benefits received by individuals in income groups that are comparable to the earnings of workers without a high school degree averaged \$1,040 per year. Public assistance for higher wage earners averaged \$385 per year in 2012.¹⁵

Another benefit of higher graduation rates is lower incarceration rates (Dobbie and Fryer 2013). According to the Georgia Department of Corrections, the annual average cost per inmate totaled roughly \$20,000 in 2015. Again, this is a benefit that would accrue mostly to state and local governments.

Lower rates of incarceration would suggest that fewer crimes are being committed. Lower crime rates would benefit communities. These benefits are harder to quantify but can be substantial. For instance, Heckman et al. (2010) estimates that the benefits to society from the reduction in crime associated with successful early childhood interventions for disadvantaged urban children account for 41 to 66 percent of the program benefits when expressed as an annual rate of return.¹⁶ (For a thorough discussion of the difficulties in estimating these benefits see, Heckman et al. 2010.)

Conclusion

Table 2 summarizes the findings from the literature discussed within this report. While fully outlined in Table A1 in the appendix, this table provides a snapshot of the mixed findings of the effectiveness of charter schools, organized by the results found in the studies (positive effects versus negative or no effects) and the geography of the schools studied (urban, nonurban, or mixed urban and nonurban schools).¹⁷ The outcomes listed are academic achievement, graduation from high school, wages, college attendance and other. Positive effects mean that the charter schools studied were shown to be a positive influence on the variable of interest; zero/negative effects indicate that the charter schools did not have a

¹⁵ These benefits included public assistance, supplemental security income and food stamps, which are predominantly federal programs.

¹⁶ This variation is due to assumptions made in the value of statistical life due to declines in the murder rate.

¹⁷ Note that the oversubscribed urban charter schools that have been studied in the literature generally are categorized as No Excuses schools.

measurable effect on the variable of interest or the effect was negative. For instance, the literature generally finds that urban charter schools have a positive effect on academic achievement. This result is indicated by the Yes in the first column of Table 2.

	URBAN		NONURBAN		MIXED GEORGRAPHY	
	POSITIVE	ZERO/ NEGATIVE	POSITIVE	ZERO/ NEGATIVE	POSITIV E	ZERO/ NEGATIVE
Academic achievement	Yes			Yes		Yes
Graduation from high school		Yes			Yes	
Wages					Yes	
College attendance	Yes				Yes	
Other	Yes					

Note: See Table A1 within the appendix for a full listing of the literature reviewed.

Table 2 shows that urban charter schools generally have positive effects on outcomes of interest: academic achievement, college attendance and other. Many of the urban schools studied would likely be classified as No Excuses schools. As shown by Angrist et al. (2013), it is this intersection of the urban disadvantaged student population and the No Excuses model that seems to generate increases in student achievement. Nonurban charter schools generally have zero or negative effects on student achievement compared to TPS. Our literature review identified no carefully done studies that have tried to measure outcomes using nonurban schools exclusively.

Studies classified as mixed geography had varied results. Some studies showed that charter schools had zero or negative effects on academic achievement, but a few studies found that charter schools had positive effects on graduation from high school, wages, and college attendance. Intuitively, these mixed results should come as no surprise. Charter schools were intended to be the testing ground for educational innovation, with each school adopting its own innovation tailored to its students. Thus, it is unlikely that they would all be successful in improving student achievement over TPS.

Preliminary results suggest that Georgia's start-up charter schools may perform in a similar fashion to those studied nationally. Some evidence suggests that Georgia charter schools in the aggregate do not have a positive effect on student achievement when compared to TPS. But some charter schools do outperform TPS in the various subjects tested. It is not clear based on the simple classification undertaken here whether the urban No Excuses model is more effective in Georgia than other types of charter schools or TPS. A future report will examine the economic impact of Georgia's start-up charter schools, including measures of academic achievement, while controlling for various charter school qualities as well as locations throughout the state. Using a much broader sample of charter schools in both urban and nonurban locations that apply different teaching methods, that future study's goal is to further understand how charter schools can have positive economic impacts on both students and the communities they serve.

Appendix: Summary of Selected Literature

The following is an annotated bibliography of recent studies of the effectiveness of charter schools. The studies included in this appendix were, with one exception, published in academic journals and use empirical techniques that allow causal inferences regarding the effect of charter schools.

Abdulkadiroğlu et al. (2011) used student assignment lotteries to estimate the effect of charter school attendance on student achievement in Boston. The effects for students who won the admissions lottery were large and significant, with middle school students' math test scores increasing by 0.40 standard deviations and ELA scores increasing by 0.25 standard deviations. High school students also had improved test scores, although the effects were not as large. The authors also evaluated a related alternative, Boston's pilot schools. Pilot schools have some of the independence of charter schools but are in the Boston Public School District and are covered by some collective bargaining provisions. The lottery estimates for pilot school students were mostly small and statistically insignificant, with some statistically significant negative effects. The authors suggested that the No Excuses style of most of the charter schools in the study may have played a role in the results. Pilot schools do not usually employ the No Excuses approach.

Angrist et al. (2010) evaluated the only KIPP school in New England at the time, KIPP Academy Lynn located in Lynn, Massachusetts, a city north of Boston with a low median income. The KIPP Lynn middle school served about 300 students in grades 5-8 and opened in 2004. The study used the 2005-08 admissions lotteries to control for potential selection bias and then compared the results of lottery winners who were accepted to KIPP Lynn to those that were not. The authors tested both groups of students and found that the characteristics of lottery winners and losers were similar. The analyses suggested that KIPP Lynn generated relatively large test score gains for lottery winners, estimated at 0.35 standard deviations for math and 0.12 standard deviations for ELA. The authors were optimistic that these were not isolated results, as KIPP runs many charter schools around the country that follow the same No Excuses model. In addition, other charter schools in the Boston area have adopted the No Excuses model.

Angrist et al. (2013) used a lottery-style research design as well as several other empirical methods to analyze Massachusetts charter schools. The authors' goal was to explain the apparent divide in performance between urban and nonurban charter schools. The researchers found considerable variation between the effectiveness of urban charter schools and nonurban charter schools. Estimates for urban charter middle schools suggested these schools generate gains of 0.32 standard deviations in math test scores and 0.15 standard deviations in ELA test scores per year enrolled. Nonurban middle schools did not appear to be effective at boosting student achievement when compared to TPS, with a decline of 0.12 standard deviations per year in math and 0.14 standard deviations per year in ELA. High school lottery results for urban schools were similar to the statewide results for middle schools, showing gains in math and ELA. Estimates for nonurban charter high schools were small, negative and not statistically significantly different from zero. Note that the state sample used in this study included only two nonurban high schools.

The researchers went on to show that urban charter schools tended to embrace the No Excuses model of teaching. They identified five key characteristics of the No Excuses model: emphasis on discipline, school uniforms, cold-calling, strict adherence to school-wide standards and the use of Teach for America alumni. Controlling for the No Excuses approach explained much of the variation in achievement between urban and nonurban charter schools. Also, the researchers found that students with certain demographic characteristics benefited more from the No Excuses approach than others. In particular, urban charter middle schools appeared to produce especially large achievement gains for students from low-income households and those with low baseline test scores.

Angrist et al. (2014) sought to test whether the gains observed in student achievement on standardized tests at some Massachusetts charter schools persist and contribute to improved outcomes linked to human capital and higher future earnings. As in earlier work on Massachusetts charter schools, the research design used the randomized enrollment lotteries at oversubscribed charter schools as a control for important unobservable student and family characteristics. The estimates suggested that the positive effects of the charter schools studied were persistent. Charter school attendance was found to have several key effects:

- Raising the probability that students passed state exams required for high school graduation
- Increasing the likelihood that students qualified for exam-based college scholarships
- Increasing SAT scores
- Increasing the frequency of AP test-taking with modest gains in scores
- Shifting students away from attending two-year institutions and toward four-year institutions and programs

The authors noted that these charter schools were remarkably effective for subgroups that have been difficult to serve, including boys, special education students, and students with low achievement when starting high school.

Bifulco and Ladd (2006) estimated the impact of charter schools on students in charter schools and students in nearby TPS, in North Carolina. They used a fixed effects study design to control for unobserved student characteristics. They found that students had smaller gains in achievement in charter schools than they would have had in public schools. The negative estimates of the effects of attending a charter school were found to be neither substantially biased nor substantially offset by positive impacts of charter schools on the performance of students in TPS. They found evidence to suggest that about one-third of the negative effect of charter schools could be attributed to high rates of student turnover.

Bifulco and Ladd (2007) used student panel data to examine the effect of charter schools in North Carolina on racial segregation and black-white test score gaps. The study found that North Carolina's system of charter schools had increased the racial isolation of both black and white students and had widened the achievement gap. It also found that the relatively large negative effects of charter schools on the achievement of black students was linked to racial isolation, as the charter schools were less racially diverse than the schools the black students left.

Booker et al. (2007) studied the performance of five cohorts of students in Texas to see how charter school attendance affected math and reading test scores. The authors were careful to control for school mobility effects and to distinguish movement to a charter school from movement within and between traditional public school districts. They found that students experienced poor test score growth in their initial year in a charter school, but that this was followed by recovery in subsequent years. They estimated that students recovered from this disruption within approximately three years. The authors suggested that the failure to account for the initial drop off and adjustment period in test scores among charter school students may have influenced the findings of previous studies on charter school academic performance.

Booker et al. (2008) tested for a competitive effect of charter schools by looking for changes in student achievement in TPS following the entry of charter schools into the market. The study used an eight-year panel of data on individual student test scores of public school students in Texas to evaluate the achievement impact of charter schools. Booker's model included student/campus fixed effects and controlled for campus demographics and peer group characteristics as well as student and family background characteristics. The author found a positive and significant effect of charter school market entrance on student outcomes for those who remained in TPS.

Booker et al. (2011) focused on charter schools in both Chicago and Florida to address several issues relevant to high school students. The authors had to adopt a research strategy that would allow them to estimate the impact that attending a charter high school had on one-time events as opposed to student achievement, which can be measured many times in a student's academic lifetime using standardized tests. The authors used the enrollment in charter schools in the eighth grade as their control for student unobservable characteristics, reasoning that students who chose to attend charter schools prior to high school were more like each other than they were like students who attended a TPS in all grades. Some of these charter school eighth graders went on to a charter high school, while others enrolled in a TPS. The authors compared the ACT scores, graduation rates and college enrollment of these two groups. They found that for charter eighth graders, continuing into a charter high school appeared to increase ACT scores, improve the probability of graduating by 7-15 percentage points and improve the probability of enrolling in college by 8-10 percentage points. The authors cautioned that because all of the charter high schools studied included middle school grades, it was possible that the positive outcomes could be attributable to the combined middle/high school configuration. Note that the authors also used a fixed effects value added approach to test student achievement and found that, on average, charter schools' effectiveness in raising student performance on standardized tests was similar to that of TPS.

Booker et al. (2014) examined two long-term outcomes for students who graduated from charter schools: college persistence and earnings. This study was one of the first to estimate charter schools' effects on earnings in early adulthood, alongside effects on educational attainment. Using data from Florida, this study confirmed previous research that students attending charter high schools were more likely to

graduate from high school and enroll in college. The study also found that students attending charter high schools were more likely to persist in college and that in their mid-20s such students earned higher wages.

Clark et al. (2011) presented findings from the National Center for Education Evaluation and Regional Assistance study originally published by Gleason et al. (2010). The paper summarized previous results of the study and found that charters tend to have positive impacts for more disadvantaged students in urban areas and negative impacts for the more advantaged students in nonurban areas.

Cremata et al. (2013) conducted one of the most extensive studies of charter schools to date, which was published by the Center for Research on Education Outcomes at Stanford University. The study was in part a follow-up to their 2009 national study that covered 16 states plus Washington, D.C. (This study was not published in an academic journal.) The study employed a virtual control record methodology that matched each charter student to a TPS student who was similar along observable characteristics. Importantly, one of the items used for matching students was a baseline test score, which the authors included so that they could compare the achievement of charter and TPS students with similar levels of prior achievement.

Covering schools in 27 states, the study found that 56 percent of charter schools had academic growth that was not statistically different than that of TPS in reading, and 40 percent of charter schools had similar growth to that of TPS in math. A quarter of the charters outperformed TPS in reading and 29 percent in math. Nineteen percent of charters underperformed TPS in reading and 31 percent underperformed in math. The study was also able to track charter effectiveness over time by comparing 2013 findings to 2009 findings for schools in 16 states. Like Sass (2006), this study provided evidence that as charter schools mature their students' achievement tends to improve.

Dobbie and Fryer (2011) examined the Harlem Children's Zone (HCZ), which combined community programs with charter schools. The study sought to test the causal impact of HCZ charter schools on educational outcomes. Using both a lottery and instrumental variables research design, the authors found that attending an HCZ charter school had a positive effect on student achievement. The results showed that students attending the charter elementary school gained approximately 0.2 standard deviations in both math and ELA test scores per year. Students in the charter middle school gained about 0.2 standard deviations in math test scores per year.

Dobbie and Fryer (2013a) studied 39 charter schools in New York City to try to determine what inputs are correlated with school effectiveness, measured by student achievement on standardized tests. The authors analyzed many different school characteristics to determine their correlation with school effectiveness. They found that five characteristics common to schools termed No Excuses schools by researchers were correlated with school effectiveness, explaining about 45 percent of the variation across schools: frequent teacher feedback, the use of data to guide instruction, high-dosage tutoring, increased instructional time and high expectations. The authors found no correlation between school effectiveness and several commonly used input measures such as class size, per-pupil expenditure, teacher certification and teacher training.

Dobbie and Fryer (2013b) estimated the effects of high-performing charter schools on human capital, risky behaviors and health outcomes using survey data from the Promise Academy in the Harlem Children's Zone. Six years after the random admissions lottery, students who attended the Promise Academy middle school scored 0.283 standard deviations higher on a nationally normed math achievement test and were 14.1 percentage points more likely to enroll in college. Female students who attended the Promise Academy were 12.1 percentage points less likely to become pregnant in their teens, and male students were 4.3 percentage points less likely to be incarcerated. The authors found that attending the Promise Academy had little impact on self-reported health. According to the authors, some evidence suggests that high-performing schools may be sufficient to significantly improve human capital and reduce certain risky behaviors among poor students and young adults.

Gleason et al. (2010) conducted the first large-scale randomized trial of the effectiveness of charter schools in multiple states and different types of communities. It included 2,330 students who applied for admissions lotteries to 36 charter schools across 15 states. The study found that, on average, charter schools were no more successful than nearby TPS in boosting student behavior, achievement and attendance. However, charter school success varied widely, with those located in large urban areas being the most successful. The study also found that charter schools were more effective for lower income and lower achieving students and less effective for higher income and higher achieving students. Overall, parents and students who won entry into a charter school were more likely to be satisfied with their school than those who did not and had to attend another school.

Hanushek et al. (2007) investigated the quality of charter schools in Texas. They used several empirical approaches, including a fixed effects value added model, to control for student unobserved characteristics. Measuring achievement in math and reading, they found that average school quality in the charter school sector was not significantly different from that in TPS after an initial start-up period of roughly four to five years.

Hoxby and Rockoff (2004) analyzed the achievement of students in a group of charter schools in the Chicago school system. At the time, the group included elementary, middle and high schools and served predominantly minority and disadvantaged students. Each school used randomized lotteries to admit applicants when oversubscribed. The authors had access to a rich data set that allowed them to examine applicants who won admission through the lottery and those who did not, and address lottery issues like noncompliance, attrition and reapplication. Finally, they examined whether the charter school treatment effect depended on a student's grade level, initial achievement and the number of years the school had been operating. The primary results were that children who were accepted into the charter school system in elementary school improved on math test scores by 6-7 percentile points and by 5-6 percentile points in reading. (Note that the study used scores on the lowa test of basic skills; thus, the percentile point measure is relative to national norms.) The results for other students in middle and high school grades were mixed.

Hoxby and Murarka (2009) analyzed almost all of the 47 charter schools operating in New York City in 2005-06. The schools tended to be located in disadvantaged and minority neighborhoods and to serve

students who were substantially poorer than the average public school student in New York City. Most of the applicants were admitted by lottery, as the schools were generally oversubscribed. The authors were careful to test that the students accepted by the lottery were no different in observable characteristics from the students who were not. The authors found that for each year of charter school attendance, student test scores in math would be expected to improve by 0.09 standard deviations and reading by 0.04 standard deviations per year. The charter school policy that was the most highly correlated with greater achievement was a longer school year, up to 220 days at some schools.

Imberman (2011) used a long panel with broad grade coverage spanning elementary though high school and a fixed effects study design to test whether charter school attendance affected cognitive and noncognitive skill formation. Schools that began as charters (start-up charters) generated improvements in discipline and attendance, which were used in the study as measures of noncognitive skills. Charter schools did not improve test scores, with the sole exception of middle school math. The author concluded that charter schools improved noncognitive but not cognitive skills. However, these improvements faded when students returned to TPS. Charters that converted from regular public schools had little impact on either skill type.

Ni and Rorrer (2011) used longitudinal student-level data from 2004 to 2009 to evaluate Utah charter school effectiveness. They used both a student-matching protocol and a student fixed effects model. Both methods produced similar results, finding that charter schools on average performed slightly worse than TPS. This result was driven by the low effectiveness of newly opened charter schools as well as high student mobility. However, as charter schools matured, they became at least as effective as TPS.

Sass (2006) used longitudinal data covering all public school students in Florida to study the performance of charter schools and their competitive impact on TPS. Controlling for student-level fixed effects, he found that achievement was initially lower in charter schools. However, by their fifth year of operation, charter schools reached the average test scores of TPS in math and produced higher reading achievement scores. Among charters, those targeting at-risk and special education students demonstrated lower student achievement. Charter schools managed by for-profit entities performed no differently on average than charter schools run by nonprofits. Controlling for preexisting TPS quality, competition from charter schools was associated with modest increases in math scores and unchanged reading scores in nearby TPS.

Zimmer et al. (2012) analyzed charter school achievement effects using a fixed effects-type methodology across seven locations: Chicago, Denver, Milwaukee, Philadelphia, San Diego, Ohio and Texas. To address concerns in previous research, they conducted sensitivity analyses that examined whether students who switched from a TPS to a charter school experienced a dip in achievement before entering the charter school and whether they had differential annual gains as compared with students who did not switch schools. In addition, they conducted an alternative analysis focused exclusively on charter middle and high schools in which all students switched schools. Overall, the authors found mixed results for charter school effects. Comparing students' performance while attending charter schools relative to the performance of the same students while attending TPS, they found that students performed similarly

across the two settings in most locations. This was true whether the researchers included all charter schools or just the charter middle or high schools.

ACADEMIC ACHIEVEMENT	EFFECT	GEOGRAPHY
Fixed Effects Studies		
Bifulco and Ladd (2006)	Zero/Negative	Mixed Geography
Bifulco and Ladd (2007)	Zero/Negative	Mixed Geography
Booker et al. (2007)	Zero/Negative	Mixed Geography
Hanushek et al. (2007)	Zero/Negative	Mixed Geography
Imberman (2011)	Zero/Negative	Mixed Geography
Ni and Rorrer (2012)	Zero/Negative	Mixed Geography
Zimmer and Buddin (2006)	Zero/Negative	Mixed Geography
Zimmer et al. (2012)	Zero/Negative	Mixed Geography
Lottery Studies		
Abdulkadiroğlu et al. (2011)	Positive	Urban
Angrist et al. (2010)	Positive	Urban
Angrist et al. (2013)	Positive	Urban
Curto and Fryer (2014)	Positive	Urban
Dobbie and Fryer (2011)	Positive	Urban
Dobbie and Fryer (2013b)	Positive	Urban
Gleason et al. (2010)	Positive	Nonurban and Mixed Geography
Hoxby and Murarka (2009)	Positive	Urban
Hoxby and Rockoff (2004)	Positive	Mixed Geography
GRADUATION FROM HIGH SCHOOL	EFFECT	GEOGRAPHY
Angrist et al. (2014)	Zero/Negative	Urban
Booker et al. (2011)	Positive	Mixed Geography
Clark et al. (2011)	Positive	Mixed Geography
Dobbie and Fryer (2013b)	Zero/Negative	Urban
WAGES	EFFECT	GEOGRAPHY
Booker et al. (2014)	Positive	Urban
COLLEGE ATTENDANCE	EFFECT	GEOGRAPHY
Angrist et al. (2014)	Positive	Urban
Booker et al. (2011)	Positive	Mixed Geography
Booker et al. (2014)	Positive	Mixed Geography
Dobbie and Fryer (2013b)	Positive	Urban
OTHER	EFFECT	GEOGRAPHY
Dobbie and Fryer (2013b)	Positive	Urban

Table A1. Charter School Literature Reviewed, Grouped by Findings and Geography

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MAY 5, 2017

THE CENTER FOR STATE AND LOCAL FINANCE

The Effect of Start-Up Charter Schools on Nearby Property Values

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ANDREW YOUNG SCHOOL CENTER FOR STATE & LOCAL FINANCE

About the Report

This is the second in a three-part series of studies commissioned by the State Charter Schools Commission and performed by the Center for State and Local Finance that analyze the economic impact of start-up charter schools on the communities they serve and on the state of Georgia as a whole. The first report summarized the academic literature on the impact of charter schools on academic development and achievement. This second report examines the economic impact of start-up charter schools on the communities surrounding them by analyzing the effects on real property values. The third report will use administrative data from Georgia's schools and government agencies to show the effect of start-up charter schools on academic achievement, the labor market, and the economic impact thereof on their communities. Examining the economic impact of charter schools on their communities has been previously undertaken in only a few other states. This series of reports, focusing on the Georgia experience with start-up charter schools, aims to make a meaningful contribution to this literature.

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Introduction

While an extensive literature examines charter schools' effects on achievement outcomes, less is known about the economic impact that these schools have on the communities in which they are located. The effect of charter schools on local property values can help reveal this economic impact. If homebuyers value access to charter schools, then demand for homes in locations that provide access to these schools will rise. Increased demand subsequently will raise the prices of the homes in the area. This report quantifies the economic impact of Georgia's start-up charter schools on the property values in the communities in which they are located.

To assess the economic impact that charter schools have on local property values in Georgia, we compiled a rich data set that includes home sales from 2004 to 2013, covering 15 school districts that include 52 start-up charter schools. We analyzed the variation in sales prices of houses across school attendance zones, as well as the variation in house values based on the distance from the charter schools. In our analyses, we control for neighborhood and house characteristics. In certain instances, when appropriate, we also analyze the differences in house prices before and after the opening of start-up charter schools.

Some charter schools utilize priority attendance zones within a larger attendance zone, which give enrollment priority to students who live within these zones. We find that for start-up charter schools with priority attendance zones, households are willing to pay an additional 3-5 percent to be within one halfmile of the school. This effect increases to roughly 8 percent in the city of Atlanta. For start-up charter schools without priority zones, the positive economic effect is mostly isolated to charter schools in the Atlanta suburbs. For this subsample, households appear to be willing to pay roughly 2-6 percent more depending on the relative distance from the school. For suburban Atlanta schools, the results also suggest that the presence of a start-up charter school can diminish the positive economic relationship between the quality of the zoned traditional public school and higher home values by offering an alternative to the zoned traditional public school.

This study includes a separate analysis of the Pataula Charter Academy, which is in southwest Georgia and has an attendance zone of its five surrounding counties. Due to the very large attendance zone and the rural nature of the counties served, we use a different model to calculate the Pataula start-up charter school's effect on property values in the five counties. Our analysis of the effect of the opening of the Pataula Charter Academy on property values in the area is inconclusive. While evidence suggests that the school's opening has had some positive effect on property values, the difficulty in obtaining needed data on home sales coupled with a smaller number of transactions limited the statistical power of the model.

The next section of this report discusses the salient features and structure of charter schools in Georgia. In the third section, we describe the economic theory of how start-up charter schools can affect home prices. The fourth section reviews the results from the recent literature. Section Five describes our research strategy, and Section Six summarizes the data used in the analysis. Section Seven describes the model and its theoretical underpinnings. Section Eight gives the results. Section Nine presents the analysis of the Pataula charter school. The final section concludes and summarizes the results.

Charter Schools in Georgia

While charter schools are public schools, two important factors differentiate them from traditional public schools. First, rather than children being assigned to a specific public school, parents can choose whether to send their children to a charter school. Second, charter schools have increased flexibility in how they educate students in exchange for increased accountability. This flexibility pertains to both state and district regulations that govern operations as well as the nature of the educational programs provided. Thus, charter schools can differ from traditional public schools in various ways, such as the length of the school day, mandatory summer school, the instructional methods offered and so forth. Charter school students are required to take the same standardized tests and cover the same basic subject matter as traditional public school students. The charter school's governing board oversees daily operations of the school and the authorizing body annually reviews the school's performance to ensure compliance with the charter contract. If the charter school does not meet the standards set by the authorizing agency, the school's charter (contract) can be revoked.¹

Per the 2013-14 and 2014-15 Georgia Charter Schools and Charter Systems Annual Report, 382 charter schools were operating in Georgia at the start of the 2014-15 school year.² These schools may be divided into three broad types (Georgia Department of Education 2014; Types of Charters):

- **Conversion Charter School:** A charter school that existed as a local public school prior to becoming a charter school. The application process for conversion requires that a majority of the faculty and staff members and a majority of parents of students enrolled in the school vote to apply for a charter. Conversion charter schools are overseen by an independent governing board that is accountable to the local school district and the State Board of Education as the authorizers. Entrance into conversion charter schools is usually guaranteed for students residing within the school attendance boundaries as determined by the local school board. If additional capacity remains at the school, the area from which students can enroll is determined by an attendance zone specified in the charter agreement.
- Start-Up Charter School: A new school created by a petition made by a nonprofit governing board. The school administration is accountable to the governing board that is accountable to the authorizing agency, which could be the local school district and State Board of Education or the State Charter Schools Commission. Start-up charter schools may determine their own attendance zones, including priority attendance zones. In Georgia, start-up charters can be further divided into two types based upon the authorizing agency.

¹ Conversion charters and charter systems have a different element of choice from start-up charters in which all attendees choose enrollment over their traditional public school option. Conversion charters and charter systems replace the local

² The Georgia Department of Education has released a more recent report, but we use the 2014-15 numbers because they include the relevant year of data used in this study.

- Locally Approved Start-Up: A charter school operating under the terms of a charter among the governing board, the local school district and the State Board of Education.
- State Charter School: A charter school created as an independent school that operates under terms of a charter between the governing board and the State Charter Schools Commission. Petitioners apply to become a state charter school if their petition was denied by a local board of education or if they will draw students from a statewide attendance zone.
- **Charter System School:** A charter school system is a local school district that operates under a charter between the school district as the charter petitioner and the State Board of Education. Schools in a charter system are different from conversion and start-up charter schools. The school district, not the school and school governing board, has the contract with the state. The locally elected school district board retains oversight and management responsibilities, including hiring school staff and maintaining facilities.

Across the United States, 5.1 percent of all public school students in the 2013-14 school year (the most recent available national data) attended charter schools (Georgia Department of Education 2015). Similarly, at the start of the 2015-16 school year, charter school students (with charter systems excluded for national comparability) represented 5.9 percent of all K-12 public school students in Georgia. If we include charter system school students in this calculation, this amount increases to 18.4 percent of the public school population in Georgia for the 2014-15 school year (Georgia Department of Education 2015).

A substantial portion of the recent growth in charter school attendance is due to schools in charter system schools. As noted above, schools in charter systems are quite different from conversion and startup charter schools. Charter systems are unique to the Georgia charter school landscape; no other state in the nation provides a mechanism for converting a local school system into a charter system (Georgia Department of Education 2014). In this report, we restrict our analysis to start-up charter schools.

Economic Theory of House Price Effects

Traditionally in Georgia, public school attendance is determined by where the student lives. This link between school attendance and residential location allows the quality of the public schools to be capitalized into the price of the home.³ For instance, a home buyer with a greater preference for higher quality public school education for their children will be willing to pay more for a home in the attendance zone of a higher quality public school, all else equal.⁴ This capitalization of school quality into housing prices has been well studied (for instance, see Black 1999).

³ Capitalization in terms of homes and educational quality is a process of adjustment in which the value of a house increases to incorporate the dollar value of the benefits of higher quality education from one attendance zone to another.

⁴ Attendance zones can vary in size across and within school districts. Large, populous school districts such as Atlanta Public Schools can have many attendance zones that correspond to different elementary, middle and high schools. Other less populous school districts may have only one elementary, middle and high school, so the attendance zone for each school corresponds with the school district boundaries. In Georgia, a single county is often the boundary for a school district and thus may also correspond to the attendance boundary in rural, less populous areas.

The idea that school choice can affect school quality has a long history, starting with Milton Friedman (1955). Friedman argued that one way to improve education outcomes is to create public school choice within school districts. The theory holds that competition among schools will improve outcomes for students. To the extent that such school choice improves education quality, it is then capitalized into the value of the housing in the relevant attendance zone.

However, the capitalization link between home values and school quality may be broken or weakened by allowing parents to choose among high-quality schools that are not tied to a specific residential location. If parents no longer must live in a specific attendance zone for their children to attend a high-quality school, rather than pay the premium to live in an attendance zone of a high-quality traditional public school in their school system, families might simply choose to transport their children to a charter school. Thus, the addition of a high-quality charter school could limit the capitalization of education quality into house prices. However, some charter schools' attendance areas are defined to some degree by where the students live: The neighborhood where a charter school locates and the nature of its attendance zones can affect its theoretical link to home prices.

It is also possible that residents view additional charter schools as a disamenity, which would lead to declines in property values. For example, if choice schools can be attended by students from outside of the neighborhood, these outside students could prove unpopular with neighborhood residents, particularly if it is perceived that these students largely come from other "undesirable" neighborhoods. Thus, the net effect of charter schools on property values is an empirical question.

Results from the Recent Literature

Recent empirical studies analyzing the effect of charter schools on property values have yielded mixed results. Some studies have found an effect while others have not. The nature of the attendance boundaries and the availability of housing within these boundaries seem to play a role in the findings. Two studies that did find an effect used data from areas where either the attendance zone or the nature of the urban area itself increased demand for quality educational opportunities. One study examined the city of Atlanta, which has the unusual feature of priority attendance zones for charter schools. The second study analyzed New York City, one of the most expensive and supply constrained urban housing markets in the country. Other studies that used data from areas without limited attendance zones and urban areas with greater housing availability did not find an effect.

Note that these studies do not include the performance of the charter schools or choice schools in their primary models. There are several reasons for this. First, home prices could be affected by the presence of a charter school before there are measures, usually test scores, available to assess performance. These effects could occur when the plans to open a charter school are announced, or in the early years, when the charter school is open but test scores might not be readily available to the public. Second, to control for unobserved neighborhood characteristics, these studies rely on a fixed effects modeling specification. Such fixed effects models use test score changes over time that occur in an individual school rather than

comparing them across different schools. In other words, fixed effects models rely on marginal changes in performance within schools to measure effects but do not take into account the average performance of the school. However, it is the average performance of schools that home buyers tend to use to make an initial assessment of school quality (see Kane et al. 2003). Thus, the inclusion of charter or choice schools' test scores would rely on researcher judgment to deal with missing data and may make the interpretation of the results difficult.

A recent report by Patrick (2015) used the priority admission zones within a larger designated attendance zone to test the effects of charter schools on property values. The priority attendance zones in the metro-Atlanta area are unusual and may factor into the result. Most charter school attendance zones in the United States and Georgia are fairly diffuse. However, 13 metro-Atlanta charter schools have priority admission zones within their designated attendance zones. Patrick used this unusual feature of metro-

Atlanta charter schools to identify the change in singlefamily residential home sales from 2004 to 2013 associated with conversion and start-up charter schools. The results suggest that households are willing to pay a premium for the increased probability of admission to charter schools in priority one attendance zones.⁵ Estimates of the increase in the sales price of single-family houses due to charter schools range from 7 to 13 percent, with an average increase in sales prices of approximately 10 percent.

Schwartz et al. (2014) used 1988-2003 New York City housing unit sales data to study the effects of choice

Estimates from a previous CSLF report show the increase in the sales price of single-family houses due to charter schools range from 7 to 13 percent, with an average increase in sales prices of approximately 10 percent.

schools on property values in New York City (NYC). According to the researchers, because NYC is a single tax district, school quality differences are less a reflection of differences in revenue than of performance.⁶ In addition, NYC has an abundance of school choice, many attendance zones and a constrained housing supply. The researchers were careful to separate out general neighborhood preferential effects from the specific effects of local school performance. They examined the link between the quality of locally zoned schools and surrounding housing values. They found evidence that the addition of a choice school nearby weakens the capitalization link between housing values and the zoned traditional elementary school, likely because the choice schools can be attended by students who live outside the traditional elementary

⁵ In Georgia, start-up charter schools may designate priority attendance zones. These different priority zones confer different probabilities of gaining admittance to a charter school to the various geographic areas within the schools' attendance area. A priority one zone is usually the zone with the highest probability of attendance.

⁶ A choice school is defined as one in which attendance is not based on the student's home address. Based on this definition, the study used data from 123 NYC choice elementary schools, of which only two were identified as charter schools. There is some evidence that charter schools can receive less funding than traditional public schools from the district. Thus, while it is possible that these two charter schools may have received less funding than the other schools in the study, it is unlikely that such a disparity would greatly influence the study's findings.

school boundary. They also found that the choice school itself is associated with higher property values for nearby housing, suggesting that the close-in community views these schools as amenities.

In a study using data from Toledo, Ohio, researchers examined the effect of charter schools on property values (Horowitz et al. 2009). They found little evidence that the existence of a charter school affects property values. The researchers studied residential values before and after charter school openings in Toledo from 1987 until the first quarter of 2006. The charter schools studied were similar to those found in most parts of Georgia as they did not have local service areas distinct from the zoned elementary schools.

The researchers focused on houses with repeat sales that occurred before and after the opening of a charter school. They found that the post-charter school sales prices had no relationship with distance from the nearest charter school, controlling for other factors. Second, they compared post-charter school actual housing sales prices to forecasted values based on housing price trends in each census tract. They found nothing relating the difference in the observed sale price from the predicted price and the variable that measured the distance from the local charter school.

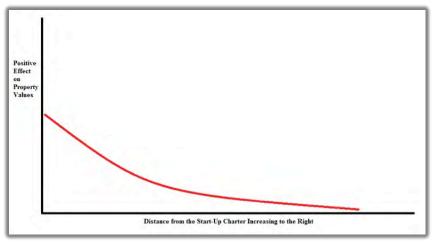
Imberman et al. (2017) examined the effect of charter schools on property values in Los Angeles County. They used 2008-11 house sale price data from Los Angeles County to estimate the impact on housing prices of having charter schools nearby. Again, the charter schools studied did not have special attendance zones that differed from those of the zoned traditional public schools. Following previous studies, the authors related housing prices to school characteristics and carefully controlled for the correlation between neighborhood characteristics and housing prices using census block fixed effects. Using the full data set, they found little evidence that the availability or distance from charter schools affected housing prices.

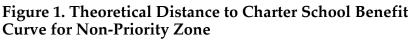
However, when the sample was restricted to include only properties located in the same school district as the charter school, they find that nearby charter schools lower housing prices. The authors suggest that this effect might be related to the California policy that requires oversubscribed charter schools to give priority to those students in the local school district in which the charter school is located. Due to the nature of the model specification, the authors were reticent to conclude that this result reflected the weakening of the traditional relationship between public school quality and home prices.

Proximity to the Start-Up Charter School and the Effect on Home Values

The opening of a start-up charter school could affect home values through multiple channels. To test this effect, we formulate a model in which home value is a function of how close the home is to a start-up charter school, while controlling for other relevant variables that could also affect home prices. This proximity model isolates any difference in sales prices of homes stemming from differences in homes' proximity to a start-up charter school. If the opening of a start-up charter school positively or negatively affected local home values, we would expect that effect to be greater for homes that are closer to the school.

The distance to a charter school can affect home values in at least two ways. First, according to traditional urban economics theory, people value being closer to an amenity — in this case, a charter school. The effect on a home's price is due to reduced travel time and travel costs to the amenity; this benefit is capitalized into the price of the home. Figure 1 shows that the travel time benefit decreases as the distance from the home to the school increases, again which follows from the standard urban economics theory (see Kane et al. 2003).





Source: Authors' illustration of economic theory

Second, living closer to a start-up charter school could add value to a home through the priority zone effect. Children living in a charter's priority zone have an increased chance of attending the charter school, a benefit if there is heavy demand for the school. In this case, the relationship that distance may have on home values is a function of whether the home is inside the border of the priority attendance zone; once the border is reached, home values drop. This priority zone effect, combined with the travel time benefits described above, produces a value function shown in Figure 2. Note the steep drop, which occurs at the border of the priority zone.

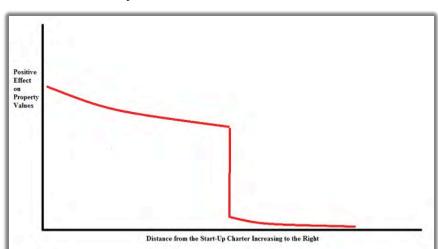


Figure 2. Theoretical Distance to Charter School Benefit Curve for Priority Zone

Source: Authors' illustration of economic theory

Our proximity model seeks to measure both effects. We expect that the positive effect on home prices of distance will diminish as one gets farther from the start-up charter school. We also expect that these effects will be larger for houses located near a start-up charter school with a priority zone.

We use concentric rings in our proximity model to try to identify the downward sloping curve that shows the diminishing value of travel time benefits for houses located farther away from the start-up charter school. Each model specification has two concentric rings and compares the sale prices of the homes within the closest ring to sales price of the homes within the next closest ring. In the first specification, the radii of the rings are the smallest, with the inside ring being 0.3 miles and the outside ring being 0.6 miles from the charter school. In the second model, the radii of the rings are a half-mile and one mile from the charter school, and the radii of the rings in the third model are 0.7 and 1.4 miles from the charter school.⁷ As discussed earlier, the effect of a charter school on property values is expected to diminish as the distance from the property increases due to higher transportation costs. Based on Black (1999), we expect this effect to be concentrated within two miles of the school.

In estimating effects that charter schools have on property values, we must control for the neighborhood characteristics of the property. Such neighborhood characteristics include among others: distance to the central business district and shopping, green space and parks, and public safety. The perceived quality of the locally zoned traditional public school is also assumed to be included. All these neighborhood factors could influence property values and could differ across neighborhoods. However, quality data on many these characteristics are difficult to obtain. The panel nature of the data, sales transactions over time, allows us to control for the influence of unobserved neighborhood characteristic on home prices using

⁷ We use a fourth model in later specifications to account for distances in suburbs and rural areas.

the fixed effects estimator. The fixed effects estimator allows for neighborhood characteristics that do not vary overtime to be controlled for, without having to include data on them.

The concentric ring approach has several advantages over the use of a continuous distance variable. First, it provides a clear border to test the average effects of distance from a charter school on property values. Second, it also allows us to more easily incorporate and interpret the results of the model using census block fixed effects necessary to control for unobserved neighborhood characteristics.⁸ Using the concentric ring model and census block fixed effects, our identification comes from houses sold in the same census block at different times and on different sides of the concentric ring border.

The sales price of a single-family residential property also depends on home characteristics, such as the finished square footage, lot size, the number of bedrooms and bathrooms, the size of the basement, the year the home was built, the condition of the home, the existence of a fireplace, the existence of a garage or carport, and whether the home has been recently renovated. These characteristics must be accounted for in any model attempting to measure home sales prices. For ease of exposition, we simply refer to home sales prices throughout our analyses, with the understanding that they include all the above elements.

We do not limit our analysis to repeated sales on the same property as previous researchers have for several reasons. Such a restriction discards valuable sales observations in the area and may prevent any analysis of areas with only a few transactions. In addition, repeat sales may introduce bias, as a disproportionate number of those properties may be distressed, be in fast-changing neighborhoods or be houses that are often "flipped."

The nonrandom location of charter schools and changes in the geographic distribution of home sales, are controlled for using elements of our model structure such as the census block fixed effects and the housing characteristics described above. In addition, a measure of the zoned traditional public school (TPS) quality, based on statewide standardized test scores is included, which is discussed in greater detail in a later section. Given the inclusion of census block fixed effects, our research strategy assumes that factors that may induce both an increase in charter supply and an increase in house value do not vary within census blocks over time. Of course, housing prices in Georgia were influenced by larger economic trends, such as the Great Recession, during the study period. To account for these general changes in house prices related to overall market conditions, we include year-by-month fixed effects in all regression models.⁹

We use a different methodology to capture the effect of one charter school, Pataula Charter Academy, which has a multi-county attendance zone. Our approach for this school is similar to a research strategy often referred to as a difference-in-differences analysis. The basic idea of this method is to compare the rates of change of the variable of interest for two groups: a treatment group and the control group. The treatment group is the five counties in the Pataula Charter Academy's attendance zone. We selected five

⁸ If a linear continuous distance measure is used, the results could be difficult to interpret due to the incorporation of the census block group fixed effects and how they might distort relative distance from the charter school.

⁹ Year-by-month fixed effects is statistical technique that is used to take changes in national market conditions and seasonal trends out of the data, using monthly average values.

counties similar to the Pataula Charter Academy's counties in terms of relevant socioeconomic characteristics such as population size, demographics characteristics, and personal income, but without a start-up charter school, to use as a control group. We compared changes in house prices across the counties in the Pataula Charter Academy's attendance zone to price changes in the control group counties.

To determine these five control counties, we first identified the relevant geographic regions. The Pataula five-county charter school attendance zone is in two Georgia Department of Community Affairs (DCA) regions, Southwest Georgia and River Valley. We added the Southern Georgia region to those DCA regions to broaden the potential counties eligible for matching. Next, we matched the median values of the following variables for the five counties (i.e., county school systems) in the attendance zone to the counties in the three DCA regions:

- the number of owner occupied houses,
- the average dollar value of owner-occupied housing, and
- the geographic density of housing stock.

This initial step produced 10 potential matching counties: Atkinson, Charlton, Clinch, Irwin, Marion, Miller, Talbot, Taylor, Terrell and Turner.

The second step was to select the five counties that were similar in residential property values prior to the opening of the charter school in 2010. A per capita residential assessed value (from the property tax digest) was used for this step. Each of the five Pataula attendance zone counties was matched with a similar county from the 10 counties listed above based on the absolute value of the average difference in per capita home values from 2005 to 2010. Some counties had several matches that were relatively close and that also overlapped with other counties in the Pataula attendance zone. The matching criteria, as well as researcher judgment, were used to pick counties that were the most similar to the counties in the Pataula attendance zone. The five matching counties selected were Atkinson, Clinch, Miller, Terrell and Turner. (For greater detail on this process, see Appendix A.) The next section shows the summary statistics for our data set and highlights various geographic characteristics of the charter schools in the study relative to TPS.

Data Summary Statistics and Overview

Table 1 shows summary statistics for the data set. We include the average values for property and home characteristics for the full sample of 444,420 home sales that occurred in Georgia from 2004 to 2013 as well as for the sample of 63,511 sales that occurred within a 1.8-mile radius of the selected start-up charter schools.¹⁰ Most of our observations in the selected start-up charter school sample come from the metro-Atlanta area. Thus, we might expect to see some differences between the average values for most of full sample and the selected start-up charter school sample. But generally, the average values for most of

¹⁰ We use data on home sales in selected Georgia counties that were geocoded and matched with performance data for charter schools and traditional public schools from 2004 to 2014. See Appendix B for a complete list of schools and counties.

the housing characteristics are similar. The average house size in square feet is 17 percent smaller in the selected start-up charter school sample than in the full sample. Fewer houses also have garages or carports in the selected sample than in the full sample. The averages did differ in two areas: lot size and house age. First, the lot sizes in the full sample are 0.7 acres compared to 0.2 acres in the start-up charter school sample.¹¹ Second, the homes in the full sample are newer, with 1972 being the average year of construction compared to an average year of construction of 1964 for those homes that were within 1.8 miles of a start-up charter school in the selected sample.

	OBSERVATIONS	MEAN	STD. DEV.	MIN	МАХ
Square Feet	444,420	2,096	1,110	0	149,713
Lot Size in Square Feet	444,420	29,011	817,003	0	194,000,000
Number of Bathrooms	444,420	2.56	1.15	0	38
Number of Bedrooms	444,420	3.16	1.17	0	74
Unfinished Basement Square feet	444,420	427	642	0	10,050
Year Built	441,094	1972	146	0	2014
Below Average Indicator	444,420	0.04	0.20	0	1
Above Average Indicator	444,420	0.35	0.48	0	1
Fireplace Indicator	444,420	0.59	0.49	0	1
Garage/Carport Indicator	444,420	0.60	0.49	0	1
Recently Renovated Indicator	444,420	0.70	0.46	0	1
SUMMAF	RY STATISTICS WITHIN	1.8 MILES AN	ID WITH A TEST S	CORE	
	OBSERVATIONS	ΜΕΛΝ	STD DEV	MIN	ΜΑΧ

Table 1. Summary Statistics All Geocoded Arm's Length Transactions

SUMMARY STATISTICS WITHIN 1.8 MILES AND WITH A TEST SCORE							
	OBSERVATIONS	MEAN	STD. DEV.	MIN	MAX		
Percent Exceed CRCT	63,511	24.15	16.22	0.091463	83.45766		
Square Feet	63,511	1,729	908	0	73,102		
Lot Size in Square Feet	63,511	8,921	144,185	0	34,900,000		
Number of Bathrooms	63,511	2.13	1.02	0	12		
Number of Bedrooms	63,511	2.97	0.98	0	14		
Unfinished Basement Square feet	63,511	518	621	0	10,050		
Year Built	63,263	1964	90	0	2013		
Below Average Indicator	63,511	0.05	0.21	0	1		
Above Average Indicator	63,511	0.25	0.43	0	1		
Fireplace Indicator	63,511	0.52	0.50	0	1		
Garage/Carport Indicator	63,511	0.38	0.49	0	1		
Recently Renovated Indicator	63,511	0.64	0.48	0	1		

Source: CoreLogic home sales 2004-13

¹¹ A standard size lot in the city of Atlanta is 50 feet by 100 feet, which is roughly 0.1 of an acre. If those lot dimensions are doubled to 100 feet by 200 feet, that yields a lot size of roughly half an acre, which is a little smaller than the average lot size of the full sample.

This rich data set allows us to analyze the effect of the selected start-up charter schools on real property values in the communities they serve. It includes sales data and property characteristics for home sales in the 28 metro-Atlanta counties as well as the other selected counties from 2004 through the first quarter of 2013. (See Appendix B for a complete list of schools and counties.) This study examines house prices within a certain distance of 52 of Georgia's more than 300 charters.¹² To gain a more complete picture of the schools in question, the CSLF team collected key information about each charter in the sample, including its distance to surrounding schools, grade levels served, teaching styles, date opened and demand for admission as determined by whether an admissions lottery was held for the 2016-17 school year.

	COUNT OF SCHOOLS	AVERAGE OF DISTANCE FROM CLOSEST START-UP	AVERAGE OF DISTANCE FROM CLOSEST SCHOOL
Cities Large and Mid-size	19	2.3	0.6
Large Suburbs	24	4.3	0.7
Towns and Rural Areas	9	28.2	4
Total	52	7.7	1.2

Table 2. Distance in Miles from Surrounding Schools (By Level of Urbanization)

Source: Authors' calculations

Table 2 presents the count of charters according to level of urbanization and average distance from neighboring schools. The majority of the 52 charters included in this study are located in large suburbs and cities, and a few are located in rural areas and remote towns. (Note that only four schools are in the mid-size city of Savannah, and 15 are in the large city of Atlanta.) The schools in the large suburbs are all in Atlanta.¹³ Small towns and rural areas include all areas outside the 28 metro-Atlanta counties and other parts of the state.¹⁴

On average, selected charters in the large cities of Atlanta and Savannah are the closest to surrounding schools — both charter and traditional public schools — implying that more school choice exists in these areas. Charters in rural and remote areas are, on average, a farther distance away from neighboring public schools and a much larger distance away from other charters. The two charters located in remote

¹² According to a Georgia Department of Education Annual Charter School report, there were 87 charter schools in 2014-15. Schools were dropped that did not have defined attendance zones or were not start-up charter schools. This excluded career academies, nontraditional high schools, district-operated schools and state charter schools with a statewide attendance zone. Schools that opened in 2014 or later were also not included due to lack of usable data. This process resulted in the full list of 52 start-up charter schools compiled by the Center for State and Local Finance and the State Charter School Commission for additional research on the economic impacts of charter schools. Note that two of the schools on that list have recently closed, the Latin Academy Charter School and Ivy Preparatory Young Men's Leadership Academy but are still included in this historical analysis.

¹³ In this research, an Atlanta suburb is defined as any area in metro-Atlanta not included in the city of Atlanta school district. Large Atlanta suburban areas include Avondale Estates, Canton, Douglasville, Forest Park, Hapeville, Kennesaw, Lawrenceville, Lithonia, Morrow, Norcross, Riverdale, Roswell, Smyrna and Stone Mountain.

¹⁴ The following are small towns and rural areas: Edison, Statesboro, East Point, Greensboro, Newnan, Senoia, Thomasville, Baconton and Norcross. The five county Pataula region is also included here.

towns, Charter Conservatory for Liberal Arts & Technology¹⁵ and Pataula Charter Academy, are located 42.7 and 38.3 miles away from the nearest start-up charter, respectively.

Some charter schools configure grade levels like traditional public schools, serving either elementary, middle or high school grades. Others aggregate the teaching of the various grade levels. Of the 52 charter schools, 25 have the traditional grade level groupings: 11 serving elementary school students, 10 serving middle school students, and four serving high school students. The remaining 27 charter schools serve some nontraditional combination of grade levels. Of these 27 charter schools, 18 schools serve some combination of traditional elementary and middle school grades, kindergarten through either sixth, seventh or eighth grade.

Most of the charter schools included in this study opened between 2000 and 2015. The majority, 27 out of 52, opened during the five-year period between 2010 and 2015, while 12 opened between 2005 and 2009. Another 13 schools opened between 2000 and 2004. The year with the most school openings is 2011, when 10 of the charter schools opened.

LOTTERY	SCHOOL COUNT	PERCENTAGE
No	7	13%
Yes	27	52%
Unknown	18	35%
Total	52	

Table 3.	Oversu	bscribed	Schools	(2016-17)
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Source: School websites

Demand for services is the final school characteristic included in the analyses. Oversubscription is one way to gauge the level of demand to attend a given school. According to the Georgia Department of Education, if the number of applicants to a charter school exceeds the number of available slots, a random lottery must be held to determine entry.¹⁶ Table 3 shows that the majority of the charters examined in this study held a random lottery or had a waiting list for the 2016-17 school year, suggesting a high demand for charter school attendance. A survey of charter school websites confirmed that 27 of them held a lottery for the 2016 school year and seven did not.¹⁷ The next section describes the results of the proximity-based analysis of the potential effect of start-up charter schools on home sales prices.

¹⁵ Charter Conservatory for Liberal Arts & Technology is now named Statesboro STEAM College, Careers, Arts and Technology Academy

¹⁶ Priority may be given to certain students based on criteria such as attendance zone, their level of economic disadvantage, whether a parent or guardian is employed by the charter school and whether a student has siblings that also attend the charter. Charter schools, however, are not permitted to take details such as race, test scores or languages spoken at home into consideration (Georgia Department of Education 2015).

¹⁷ The remaining 18 charter schools did not have relevant information available on their websites.

Equation 1 shows our base model, which is designed to test for the potential effects of proximity to a start-up charter school. It is estimated using various sets of charter schools and is not used for individual charter schools.

Equation 1: log(*Sales Price*)_{hmy}

 $= \beta_0 + \beta_1 W + \beta_2 PSP_{hy} + \beta_3 SUA_{hy} + \beta_4 SF_h + \beta_5 LS_h + \beta_6 LS_h + \beta_7 Bed_h$ + $\beta_8 Bath_h + \beta_9 Base_h + \beta_{10} HA_h + \beta_{11} BAC_h + \beta_{12} AAC_h + \beta_{13} FP_h + \beta_{14} Gar_h$ + $\beta_{15} RR_h + \gamma MonthYear + \delta CBG$

The dependent variable, $\log(Sales Price)hmy$, is the logged price of a single-family residence sold during a particular year and month.¹⁸ β_0 represents the constant term in the model and what a single-family residence would have sold for if all other variables took a value of zero. W equals one if the home is within a specified distance from a start-up charter school included in the study, and equals zero if it is within the two boundaries of the outer concentric circle, a concentric circle just around the school outside the closer threshold. For example, using the inner ring of 0.7 miles, only sales included in the analysis would be within 1.4 miles of a start-up charter school. In this case, β_1 would be the percentage difference in the sales price of homes that sold within the 0.7-mile threshold distance from a start-up charter school compared to the sales price of homes that occurred between 0.7 and 1.4 miles away from the school.

 PSP_{hy} is a measure of local public school performance; it is the percentage of tests on which students exceeded expectations on the Criterion-Referenced Competency Tests (CRCT) from the zoned traditional public elementary school.¹⁹ The CRCT was the only standardized test administered at all elementary schools in Georgia over the entire study period. Students were tested on their competency in language arts, reading and math. Third, fourth and fifth graders also were tested on their competency in social studies and science. The variable represents the percentage of tests that exceeded the standard in the zoned elementary school in the year preceding the year of the home sale. This is a different measure from the percentage of students that exceeded the standard, as one student takes several tests and could exceed the standard on one test and not on another.²⁰ Elementary schools were chosen because their attendance zones are significantly smaller than middle and high school zones and are a narrower indicator of local school quality.

¹⁸ We limit the sample to non-distressed arm's length transactions or transactions in which the buyer and seller are unrelated, and neither is acting under duress. These limitations ensure that the data reflects the fair market value of the property.

¹⁹ We obtained the historical attendance maps for as many school districts as possible to ensure that test scores were accurately matched to transactions historically. Districts for which we were able to obtain historical attendance zones include the city of Atlanta, Fulton County, Cobb County, Gwinnett County and DeKalb County.

²⁰ Using the percentage of tests that exceeded the standard is a simpler measure to work with for measuring school performance than the percentage of students that exceeded the standard, as different numbers of students in each school take different tests. Thus, computing a student average per school for all subjects would require additional computational steps and potentially researcher judgment on the number of students to use.

 SUA_{hy} is the age of the closest start-up charter school to the home sold. This variable captures the effect of the age of the school on the home sale price. Prior research has shown that charter schools are more likely to improve student achievement the longer they are open, likely because they have more time to improve their methods (e.g., Sass 2006). Generally, the start-up charter schools in this study showed higher percentages of exceeding expectations on CRCT tests the longer they had been in operation. Although not researched directly, the age of the charter could affect property values as well. Information on the school's performance as well as other signals of the school's quality might not be available in the early years.

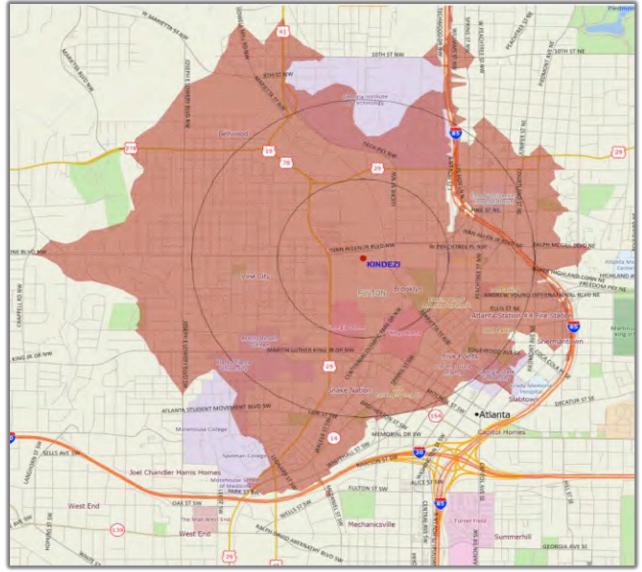
 SF_h is the square footage of the home, LS_h is the lot size in square feet, Bed_h is the number of bedrooms, $Bath_h$ is the fractional number of bathrooms, $Base_h$ is the square footage of unfinished basement, and HA_h is the year the property was built. BAC_h is an indicator variable that equals one if the assessor indicated that the property was in below-average condition, and zero otherwise. AAC_h is an indicator variable that equals one if the assessor indicated that the property was in above-average condition, and zero otherwise. AAC_h is an indicator variable that equals one if the assessor indicated that the property was in above-average condition, and zero otherwise. FP_h is an indicator variable that equals one if the property has a fireplace, and zero otherwise. Ra_h is an indicator variable that equals one if the property has a garage or carport, and zero otherwise. RR_h is an indicator variable that equals one if the property had a major renovation within 10 years of the sales date, and zero otherwise. MonthYear is a set of indicator variables for the month and year in which the sale occurred, and CBG is a set of census block group indicator variables.

RESULTS

Two different effects are potentially present. The first effect is driven by the benefits of being closer to an amenity, the start-up charter school, such as reduced travel time. The second is the potential benefit of being within the priority enrollment zone of the start-up charter school. The priority zone effect has been documented in previous research and may confound our estimation if used with a sample that includes start-up charter schools without priority zones (Patrick 2015). The concentric ring model is able to test for both effects. If both effects are present, we would expect the magnitudes of the coefficients on priority zone concentric ring distance variables to be larger than those for non-priority zoned start-up charter schools. Thus, we estimate Equation 1 separately for charter schools with and without priority zones.

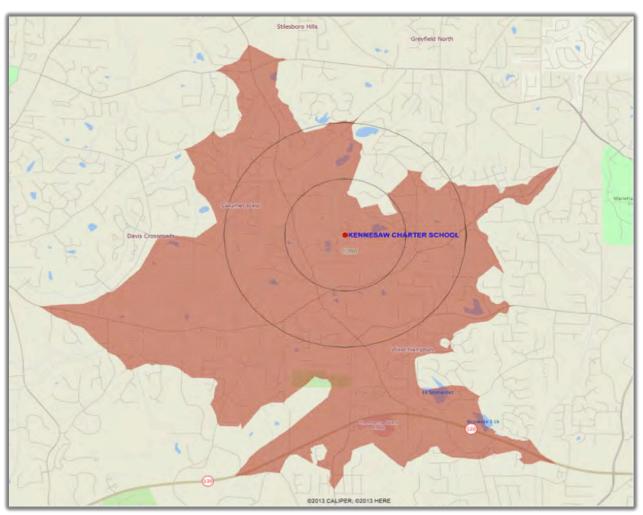
We also split the samples by different geographic locations, as prior studies have found that effects may differ in urban versus suburban and rural areas (Tuttle et al. 2012). Some of the schools in our sample are located in urban Atlanta or suburban Atlanta, some are in small cities and towns in other areas of the state, and some are in rural areas. It is possible that the relationship between distance to the start-up charter school and property values is different depending on the type of geographic setting of the start-up charter school and homes.

The geography of the region can affect the relationship between distance to the start-up charter school and home values in the following manner. The price effect on property values of distance to a start-up charter school is a function of changes in travel cost due to shorter commute times. The distance traveled in a given amount of time may differ in urban versus suburban and rural settings. For instance, it may only be possible to go an average of 1.5 miles in five minutes in an urban area (average speed 18 mph) versus three miles in five minutes in a suburban or rural area (average speed 36 mph). Walking to school is also common in urban environments but much less likely in the suburbs. The relationship between distance and travel time is further illustrated in figures 3-5.



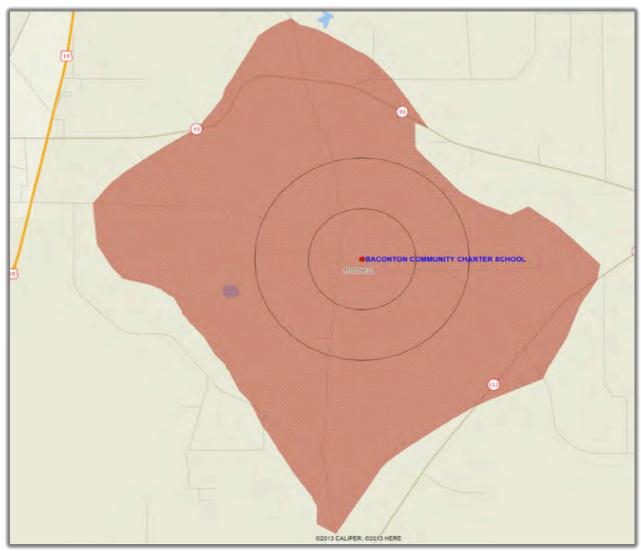


Source: Authors' calculations using Maptitude software Note: The two concentric circles are the half-mile ring and the one-mile rings.





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Source: Authors' calculations using Maptitude software Note: The two concentric circles are the half-mile ring and the one-mile rings.

The relationship between the concentric circles we use to test the effects of distance and estimated travel times in a car are shown in figures 3-5. In each figure, the two concentric circles are the half-mile ring and the one-mile ring. The shaded area is the distance one can drive in five minutes in optimal travel conditions centered on the various charter schools. Figure 3 illustrates the more limited distance that can be covered in five minutes in a highly urban area, using the Kindezi Charter School in downtown Atlanta as an example. Here, the 1.0-mile ring is a rough approximation of this distance. Figure 4 shows a typical suburban Atlanta five-minute travel distance centered on the Kennesaw Charter School in Cobb County. Note here that the five-minute travel time in some areas is considerably larger than the 1.0-mile ring. Travel time depends on access to major road networks in the area. Finally, Figure 5 illustrates a typical rural county five-minute travel distance, with the Baconton Community Charter School located in Mitchell County as an example. The five-minute travel time is considerably larger than the 1.0-mile ring in almost

every direction. (In many places, it appears that a concentric ring of 2.0 miles centered on Baconton would fit into the five-minute drive time.) Thus, it is possible that the concentric rings used to test the effect of distance to the start-up charter school on home values should be larger for suburban and rural areas. We test the finer geographical classifications using the larger concentric rings in suburban and rural areas only in the model.

Second, it is possible that when a charter school enters a region, it can decouple the traditional link between home prices and TPS elementary school quality. If the start-up charter school offered educational opportunities that families believed were better than or comparable to the TPS, these families would no longer be constrained by purchasing a home in the smaller, higher quality elementary school zone. This could result in lower home prices in that area. It is also possible that families who chose to attend the start-up charter school might locate in areas with low-performing TPS and relatively inexpensive housing. Over time, this behavior could bid up the prices of these homes despite the poor performance of the TPS. This type of decoupling of TPS school quality and home prices may affect the results of our model, which is designed to capture the traditional relationship that distance has on perceived amenities. We may also be able to identify decoupling in the absence of a priority attendance zone, which functions in a similar fashion to the smaller elementary school attendance zones. We run our model on different geographies with and without priority attendance zones to help identify whether and where decoupling is occurring.

Summary of Results for Priority and Non-Priority Zoned Schools

We first examine home sales that took place near start-up charter schools that have tiered priority zones. As discussed earlier, being in a priority one attendance zone in Atlanta has been found to increase property values (Patrick 2015). The existence of priority attendance zones may affect the premium on distance: Typically, the closer the property is to the school, the more likely it is that the home will fall within a priority one zone, the zone most likely to attend the start-up charter school.

	PRIORITY ZONED SCHOOLS ONLY	ATLANTA CITY START- UP PRIORITY ZONE ONLY	NON- PRIORITY ZONED SCHOOLS	ATLANTA CITY START-UP NON-PRIORITY ZONE ONLY	ATLANTA SUBURB START-UP NON-PRIORITY ZONE ONLY
VARIABLES	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
CONCENTRIC RING DISTANCE					
Within 0.3mi v 0.3mi-0.6mi	0.0535**	0.0816**	-0.00386	0.0193	NA
Within 0.5mi v 0.5mi-1mi	0.0353*	0.0802***	0.00985	-0.0909*	0.0423***
Within 0.7mi v 0.7mi-1.4mi	-0.0234	0.0112	0.0206*	-0.0692*	0.0601***
Within 0.9mi v 0.9mi-1.8mi	NA	NA	NA	NA	0.0263**
PERCENT EXCEED CRCT					
Within 0.3mi v 0.3mi-0.6mi	0.00896***	0.0102***	-0.00305***	-0.00265	NA
Within 0.5mi v 0.5mi-1mi	0.00537***	0.00446***	-0.0011	0.0038	-0.00314***
Within 0.7mi v 0.7mi-1.4mi	0.00728***	0.00656***	0.000641	0.000402	-0.000731
Within 0.9mi v 0.9mi-1.8mi	NA	NA	NA	NA	-0.000355
START-UP AGE IN YEARS					
Within 0.3mi v 0.3mi-0.6mi	0.0149	0.0111	-0.0922***	0.0185	NA
Within 0.5mi v 0.5mi-1mi	0.0315***	0.0341***	-0.0582***	-0.0919	-0.0438**
Within 0.7mi v 0.7mi-1.4mi	0.0283***	0.0310***	-0.0182***	-0.0564	-0.0457***
Within 0.9mi v 0.9mi-1.8mi	NA	NA	NA	NA	-0.0233***

Table 4. Summary of Home Sale Price Results by Attendance Zone Type

Estimated with robust standard errors, see Appendix tables C1-C6 for details.

*** p<0.01, ** p<0.05, * p<0.1

Source: Authors' calculations

Priority Zone

Table 4 summarizes the relevant regression results for our key variables of interest. (See Appendix C for tables showing the full regression results as well as a brief discussion of other variables.) The results for all geographies with priority zones in column 1 and for the city of Atlanta in column 2 are very similar. Thus, we focus our discussion on the results for the city of Atlanta. The literature has shown that students in urban areas can benefit academically from start-up charter schools (Tuttle et al. 2012). Atlanta has some of the longest running start-up charter schools in the state, including eight with priority attendance zones. These eight also make up most of the sample and thus drive the results. Note the results presented throughout this report represent the effects that the explanatory variables have on home prices on average. Thus, caution must be used in applying these results to individual start-up charter schools existing or proposed.

ATLANTA CITY START-UP PRIORITY ZONE

In Table 4, the results for the concentric ring distance variables, specifications 1 and 2, have statistically significant coefficients. Specification 1 shows results for properties within 0.3 miles of a start-up charter school compared to those between 0.3 and 0.6 miles of a charter. Being within 0.3 miles of a charter is

In the city of Atlanta, being within 0.3 miles of a charter school with a priority attendance zone is estimated to increase the sales price of a home by 8.2 percent, compared to homes in the concentric ring of 0.3 to 0.6 miles. For these charter schools an additional year of operation also increases the value of a nearby home by roughly 3 percent, on average. estimated to increase the sales price of a home by 8.2 percent, compared to homes in the concentric ring of 0.3 to 0.6 miles.

Specification 2 indicates that properties within a half-mile of a start-up charter school sell for more than those between a half-mile and a mile from a start-up. The value of the coefficient is 0.0802; thus, the effect of being within this distance is estimated to increase the sales price of a home by 8.0 percent.²¹ The third specification compares properties within 0.7 miles of a start-up charter school to those between 0.7 and 1.4 miles from a charter. The value of the coefficient is positive but not statistically significant.

These results suggest that the effect of a start-up

charter school on home values is greatest near the inner ring of the school — between 0.3 (1,578 feet) and 0.6 miles (3,168 feet) from the school — due to the benefits of decreased travel time. As expected, this effect decreases slightly but is still positive and statistically significant at the second concentric ring, as travel time increases in the larger concentric ring. At greater distances, beyond 0.7 miles and less than 1.4 miles from the school, the effect of the start-up charter school on property values may be too tenuous to be measured in the city of Atlanta.

The two education-related variables studied in the literature — the age of the start-up charter school and the achievement level of the zoned TPS as measured by the CRCT exceeds expectations variable — also have the expected signs and are statistically significant. The CRCT exceeds expectations variable is statistically significant and positively related to sales prices of homes, with a value of 0.0102 for specification 1 and 0.0045 and 0.0066 for specifications 2 and 3, respectively. This means that an increase of 1 percent in CRCT exceeds expectations test scores, at the TPS, would increase estimated property values by 0.4 percent to 1.0 percent. The coefficient for the age of the charter school is also positive in all three specifications and is statistically significant in specifications 2 and 3, with the values of 0.0341 and 0.0310, respectively. Thus, an additional year of operation for a start-up charter school on average would increase the value of a nearby home by roughly 3 percent in both specifications.

ATLANTA SUBURBS PRIORITY ATTENDANCE ZONE

The other potential geographical subsample in this section, Atlanta suburban charter schools with priority attendance zones, is not well suited for the proximity model. As our task is to test whether charter schools affect property values in the aggregate, our model is designed to test the effects of many schools

²¹ In specifications 2 and 3, the effect size for the concentric ring distance variables is similar to that found by Patrick (2015) for the premium of being in a priority one zone.

at once, using the two concentric areas around the start-up charter school. As such, it relies on a large number of observations to mitigate the effects of a relatively small number of outlying transactions that may be associated with a small number of schools. As we have shown, the model is well specified to do that, producing reasonable estimates of housing characteristics that determine home prices (see Appendix C). It is possible that when a subsample contains only a few schools, the locations or geographical features that surround these particular schools may be unusual and produce unexpected results.

Our sample contains only three Atlanta suburban priority zoned charter schools: DeKalb Path Academy, which includes 5,289 transactions; KIPP South Fulton Academy, which includes 3,380 transactions; and the Museum School of Avondale Estates, with 857 transactions. DeKalb Path Academy and KIPP South Fulton Academy both have priority zones with unusual geographical features. The DeKalb Path Academy priority one zone is bounded to the southeast by Interstate 85 and to the northwest by a line to the north of and parallel to Peachtree Road/Peachtree Industrial Boulevard. The priority one zone also includes a portion of Interstate 85 and the Peachtree Industrial Boulevard commercial corridor, one of the busiest in the city of Atlanta. The school is located on the boundary of Oglethorpe University campus and not far from Peachtree DeKalb Airport. The priority one zone for KIPP South Fulton Academy includes eight elementary schools and another seven elementary schools in its priority two zone. Such large priority zones may also include major thoroughfares, railroad tracks and large commercial properties. These various land uses can interact in unusual ways and distort how distance from residential property to the charter school affects home prices.

These two charter schools account for 91 percent of the observations in this subsample, skewing the results. Thus, we do not report the results for the subsample for suburban Atlanta priority zoned schools, as the results would not offer us any generalizable effects beyond these two schools. (Note that these schools are included in the larger samples.)

Non-Priority Zoned Schools

Columns 3-5 of Table 4 show the results of the same regression model as in columns 1 and 2, but the sample of home sales is restricted to only areas with start-up charter schools that do not have priority zones. The model's results vary across the three subsamples. Column 3 shows the results for all non-priority zoned schools.

ATLANTA CITY START-UP NON-PRIORITY ZONE

Column 4 examines the effect that city of Atlanta charter schools without priority attendance zones have on property values in the city of Atlanta. For this subset of the data, the model's results are inconclusive. The concentric ring distance variables for specification 2 (within 0.3 miles of a charter vs. 0.3 to 0.6 miles from the charter) and specification 3 (within 0.5 miles of a charter vs. 0.5 to one mile from the charter) are negative and marginally statistically significant. In addition, neither the CRCT exceeds expectations variable nor the age of the start-up charter is statistically significant, and neither has a consistent sign, with some coefficients having positive signs and some negative signs. Several potential reasons exist for these inconsistent results. First, this subset of the data has limited observations, from 823 for specification 1 to 3,145 for specification 3. These transactions occurred near nine start-up charter schools. It is possible that, due to this limited number of observations, our results are strongly influenced by a handful of schools with anomalous characteristics. Second, the larger concentric rings that we use to measure the effect of distance can include multiple neighborhoods in the city of Atlanta. It is possible, given the limited number of observations, that the model might be picking up unrelated neighborhood effects, with greater distance from a start-up charter school putting a house in a better neighborhood or section of the city. It is also possible that travel costs are too small to be reflected in the data or that parents place a small premium on travel distance. These results suggest that in the city of Atlanta, start-up charter schools without priority zones are not likely to increase the value of nearby homes.

ATLANTA SUBURBS NON-PRIORITY ATTENDANCE ZONE

We next examine the Atlanta suburbs that have start-up charter schools without a priority attendance zone.²² Here we use the larger distance ring to better match reasonable travel time in the Atlanta suburbs and drop the first ring with the outer boundary of 0.6 miles. Several factors of suburban living make the first inner ring distance unsuitable in the suburbs. First, it is unlikely that students or families are walking to school in the suburbs. Thus, the travel time in a car or on a bus in the inner ring between 0.3 and 0.6 miles may not be a meaningful travel time difference. Second, suburban zoning may make living very near a school less appealing. It is likely schools in the suburbs are sited in or near commercial districts with busy roads. There may be limited single-family residential houses near these schools, and such homes may be unappealing to families with children due to concerns about safety, noise and other disamenities associated with living near busy commercial corridors.

Column 5 shows the results for nonpriority suburbs in the metro-Atlanta area. Examining just the Atlanta suburbs, all the concentric ring distance variable coefficients are positive and statistically significant. Specification 2 shows the results for properties that are within a half-mile of a start-up charter school compared to those between one-half and one mile of a charter. The value of the coefficient is 0.0423. Thus, the effect of being within this distance is estimated to increase the sales price of a home by 4.2 percent.

In specification 3, properties that are within 0.7 miles of a start-up charter school sell for higher prices than those located between 0.7 and 1.4 miles from a charter. The value of the coefficient is 0.0601; thus, the effect of being within this distance is estimated to increase the sales price of a home by 6.0 percent. For the specification for properties that are within 0.9 miles of a start-up charter school compared to those between 0.9 and 1.8 miles from a charter, the value of the coefficient is 0.0263 and statistically significant, adding 2.6 percent to the values of homes within this distance.

²² The counties included are Fulton, Cobb, DeKalb, Gwinnett, Cherokee, Clayton and Douglas. Again, an Atlanta suburb are those metro-Atlanta areas outside the city of Atlanta school district.

The coefficient on the CRCT exceeds expectations variable for specification 2 is negative and statistically significant, and the signs for specifications 3 and 4 are also negative but not statistically significant. These results suggest that the relationship traditionally seen between TPS CRCT exceeds expectations scores and property values may have been changed by the presence of start-up charter schools. The negative and statistically significant values on start-up charter school age coefficients in all three specifications suggests that as the start-up charter school ages, the values of homes within a 1.8-mile radius of the school declines.

The results in column 5 provide additional evidence that some decoupling may be occurring. Properties in the Atlanta suburbs near start-up charter schools are more valuable, and the CRCT exceeds expectations variable is negative. Together, these results suggest that families now are less willing to pay to be in better TPS elementary school zones as they now have a start-up charter school option. We believe that it is this result from the Atlanta suburban start-up charter schools that is likely generating the similar result found in column 3, for nonpriority zones in the full sample.

Summary

Our results suggest several broad patterns. First, the positive effects resulting from residing closer to a charter school seems to be associated with the presence of a priority attendance zone. Thus, in addition to the benefit of decreased travel time that proximity brings, some of the effect is also likely driven by properties closer to the charter school being more likely to be in the priority one enrollment zone, increasing the chance of admission into the school. However, the traditional link between TPS quality and home prices remains: Families are still willing to pay more to live in higher performing TPS elementary school zones. These effects are particularly strong in the city of Atlanta subsample.

Second, we find some evidence in the subsample of non-priority start-up charter schools in the Atlanta suburbs that start-up charter schools can add value to homes and also decouple the traditional relationship between home value and TPS quality. In this subsample, we again find a positive effect on home values for those closer to the charter school, revealing the benefits to travel time that proximity brings. However, families do not receive the additional benefit from an increased chance of gaining admission due to location, as is the case with priority zones. Instead, in the suburbs, the lack of priority zones seems to weaken the traditional link between TPS elementary school quality and home prices.

In the metro-Atlanta area, we generally find a positive effect on home values for those closer to the charter school, revealing the benefits to travel time that proximity brings.

ROBUSTNESS

It is possible that our results are capturing some preexisting relationship between the future location of the start-up charter school and home values, potentially due to some other amenities located close by. Thus, the relationship between home prices and distance from the start-up charter school may not be fully attributable to the new start-up charter schools. For instance, a new shopping center opens at roughly the same time and near the start-up charter school. As mentioned previously, we attempt to control for this by using census block fixed effects in combination with the concentric ring approach. In addition, we have many start-up charter schools in our sample, which greatly diminishes the likelihood that some preexisting relationship or concurrent event that improved property values within similar distances of start-up charters occurred across a significant portion of these areas to affect our results. Also, the month and year fixed effects should control for any broad state or national time trend, such as the Great Recession.

As a robustness check, we test for the remote possibility that there was a preexisting relationship between distance from the start-up charter school in each of the areas and home values that could also partially contribute to our findings of improved property values in some subsamples of the data. We use the sales data from transactions that occurred before a charter school opened and construct a differencein-differences model. This method compares the rates of change of the variable of interest for two groups, a treatment group and a control group. The treatment group consists of home sales that occurred after the start-up charter school opened within the relevant concentric rings. The control group comprises the home sales that occurred in the same relevant concentric rings but before the start-up charter school opened. When this type of model is run on the subsample of charter schools without priority zones, the results do not support a finding that some preexisting home price trend existed prior to the opening of the start-up charter schools. This provides additional evidence that our charter school property value result was not due to a preexisting relationship between distance from the start-up charter school and home prices in the data.²³

For several reasons, we are unable to adequately use the difference-in-differences method on the subsample of start-up charter schools with priority zones. First, many of the start-up charter schools with priority zones were open prior to 2004. Thus, we have no data for sales that occurred prior to their opening. Second, due to the closeness of the charter schools in the city of Atlanta with priority zones, the designation of sales as occurring before or after the opening of a start-up charter school is problematic. Many of the transactions are potentially in the before group for one charter school but in the after group for another charter school. Such transactions would be in the control group for one charter school and in the treatment group for another, producing unreliable regression results. These two situations occur predominately in the city of Atlanta for start-up charter schools with priority zones, greatly limiting our potential pool of observations. With so few observations, our regressions run on this subsample produce inconsistent and inconclusive results.

 $^{^{23}}$ We do not report the results of these regressions here, but they are available upon request.

However, other empirical evidence from Patrick (2015) has shown that charter schools with priority zones do affect property values. Recall that her research design was a border discontinuity approach that avoided the concerns of an existing trend in property values by not relying on a distance measure from the relevant start-up charter school.

An additional concern is that the census block groups we use as our fixed effects area are not reasonable proxies for neighborhoods and thus do not adequately control for unobserved neighborhood effects. Here again we rely on evidence generated from the city of Atlanta. Atlanta has implemented the Neighborhood Planning Unit (NPU) to allow for citizen input into planning and zoning decisions. These NPUs were created from existing city neighborhoods. Because NPUs are made up of groups of similar neighborhoods, we can use NPUs to test the validity of our assumption that census block groups also generally conform to neighborhood boundaries. We examine the block group map and the NPU map for the city of Atlanta and find that the two are generally consistent. We also run the model using NPU designations rather than block groups for the fixed effects, and the results are very similar to the block group specification. A benefit of using census block groups is that they are smaller than city of Atlanta-defined NPUs and may control for variation that might exist within an NPU. In addition, census block groups are the only designated area available for the full data set. In the next section, we examine the special case of the Pataula Charter Academy.

Pataula Charter Academy

To capture the effect of one charter school, Pataula Charter Academy, which has a five-county attendance zone, we use a different methodology, the difference-in-differences approach. Again, this method compares the rates of change of the variable of interest for a treatment group and a control group. The treatment group is the five counties in the Pataula Charter Academy's attendance zone. For the control group, we selected five similar counties in terms of relevant socioeconomic characteristics such as population size, demographics characteristics and personal income that do not have a start-up charter school (as discussed in the research strategy section).

This type of analysis is appropriate and necessary to estimate any potential property value effect from the existence of Pataula Charter Academy. This region of Georgia is rural, and single-family residences do not sell as frequently as in more urbanized areas. Consequently, we have only a small number of observations upon which to measure a statistically significant effect. Our previous analysis based on proximity relied heavily on multiple sales within small neighborhoods that only differed in their distance from the charter school. This type of analysis would not be possible for the study of the Pataula Charter Academy due to the limited sales transactions. It is also likely that the transportation cost of small distances is very different in a rural area without urban congestion (see figures 3 and 5). Also, Pataula Charter Academy opened in 2010, and we can observe home sales in our data both before and after its opening, making a difference-in-differences analysis possible.

The rural nature of this area limited the home sales data that we could observe. Rural addresses pose problems when geocoding for homes' latitude and longitude coordinates, which are required for calculating distances and identifying census block groups. Also, some counties' sales transaction files do not cover all the years in our sample, creating nonrandom holes in our data that cause concern in establishing trends between our treatment and control groups both before and after 2010. To account for these issues, we combine two data sets of sales transactions for these 10 counties, resulting in a dataset of 1,932 geocoded home sales that were evenly distributed across all 10 counties and the years 2004-14.²⁴ Approximately 850 additional homes sales occurred in the area during the study period, but they were not available for the analysis because we could not identify their home characteristics or reasonably geocode their location.

After controlling for census block group fixed effects and home characteristics, regressions of the home sales before 2010 show that homes were appreciating slightly faster in our comparison group of counties than were homes in the Pataula attendance zone, but the difference is not statistically significant. Month and year fixed effects are included in the final analysis to control for steady property appreciation over time that is similar across all the areas included.

RESULTS

The difference-in-differences model relies on specifying three dichotomous variables (referred to in the literature as dummy variables) to measure the effects of interest. In our analysis, the first variable measures the effect if the sale occurred in the Pataula attendance zone in any year. This isolates the effect of being a home within the Pataula attendance zone at any time between 2004 and 2014. The second variable indicates that the sale took place after July 2010 in any of the counties in the Pataula attendance zone or the control group.²⁵ This isolates the effect of the sale occurring after the opening of the school regardless of whether it sold in the Pataula attendance zone or in the comparison group of counties. The third variable is the product of the first two and isolates the effect of being in the Pataula attendance zone after 2010 on the home sale price, compared to the control group of counties. We use this third variable to measure the effect of the school opening on property values in the Pataula zone. Note that our analysis assumes that no other event occurred in 2010 that could also have raised property values in the Pataula attendance zone, such as the opening of a large, new firm or other amenity.²⁶

²⁴ One came from qpublic.net, a site that organizes and distributes parcel-level data for many tax assessors in Georgia. The other was obtained from CoreLogic, an aggregator of parcel-level data files that include sales transaction and home characteristics data. The Qpublic data set allowed us to add an additional year of sales to the analysis.

²⁵ Recall, sales slightly before the opening of the charter school are included in the analysis as the home prices could be affected by the announced opening.

²⁶ The analysis also assumes that no such event occurred in the comparison counties. We examined data from the One Georgia Authority, an agency tasked with bolstering business development in Georgia, to check this assumption. Both five county regions experienced modest economic development activity around 2010. However, this modest level of activity is similar in both regions and does not appear to be substantial enough to have a material effect on the regions' housing prices.

VARIABLES	LOG HOME SALES PRICE
Pataula Zone All Years	-0.0569 (-0.313)
After July 2010 All Counties	2.418*** (-0.815)
Pataula Zone and After July 2010	0.122 (-0.0764)
Percent Exceed CRCT	0.684 (-0.786)
Acres	0.0243*** (-0.00891)
Square Feet	0.000274*** (-0.0000452)
Number of Bathrooms	0.146*** (-0.0357)
Number of Bedrooms	-0.0214 (-0.0187)
Basement Square Feet	0.000434*** (-0.000134)
Below Average Condition	-0.515*** (-0.075)
Home Age in Years	0.000169* (-0.0000987)
Fireplace	0.210*** (-0.044)
Garage	0.298*** (-0.0413)
Recent Renovation	0.256*** (-0.0943)
Neighborhood	0.102** (-0.0462)
Month Year Fixed Effects	γ
Block Group Fixed Effects	Y
Constant	8.314*** -0.315
Observations	1,932
R-squared	0.498

Table 5. Pataula Difference-In-Differences

Robust standard errors in parentheses

*** p<0.01, ** p<0.05, * p<0.1

Source: Authors' calculations, Qpublic, CoreLogic, and School district attendance area maps and test scores

The direction and statistical significance of our explanatory variables matches our previous model with a few exceptions (see Table 5). The CRCT exceeds expectations variable is positive but not statistically significant. Many of the counties in this analysis have only one elementary school; residents, thus, likely have no meaningful choice of elementary school based on place of residence within the county. This regression includes acres of land rather than square feet and is positive and statistically significant. This suggests that in these rural areas, larger lots increase home prices. This model also includes an indicator variable for "neighborhood," which indicates that the home was

The results from the analysis of the Pataula Charter Academy suggest that the charter school has had some positive effect on local property values.

described as having a subdivision or neighborhood in the data. Due to the sparse populations in these rural counties, census block groups are geographically larger than in urban areas and thus could contain considerable variation in housing stock quality and style. It is likely though that houses that were built at roughly the same time as part of a new subdivision or neighborhood are of similar quality and style. This neighborhood variable is included to try to better control for neighborhood like variation within census block groups. This variable is statistically significant and positive, suggesting that being part of a subdivision or neighborhood does increase home value.

The R-squared for this model is 0.498, indicating that the model is explaining about half of the variance in home prices. This is in contrast to the R-squared from column 1 of Table 4 for priority zoned schools of 0.67 and column 3 of Table 4 for non-priority zoned schools of 0.76 (see Appendix Tables TC2 and TC3). This indicates that these model specifications are explaining about three-quarters of the variance in home prices. This lower level of explanatory power for the Pataula model is likely due to factors outside of our set of variables that influence home prices in this area. Census block group fixed effects, for example, could be much less representative of fixed neighborhood characteristics in rural areas. Due to their larger size, one census block group in these areas could include lakefront vacation homes as well as homes closer to a town, which could be driving the lower R-squared statistic.

The result for the variable of interest, Pataula attendance zone after 2010, is positive but not within the normal range of statistical significance. The coefficient is 0.122 with a relatively small standard error, suggesting that the Pataula Charter Academy has likely had some positive effect on local property values.²⁷ However, because of the lack of traditional statistical significance, we cannot be certain of the size of this effect. This low level of statistical significance is most likely due to the data limitations in the Pataula analysis.

²⁷ More technically, the coefficient is 0.122 with a standard error of 0.0764, which indicates that we can reject the hypothesis that Pataula Charter Academy is having no positive effect on property values in the region with 85 percent confidence.

Start-up charter schools affect property values through two different channels. First, property values could benefit from being closer to an amenity, the start-up charter school. Second, property values could benefit from being within the priority zone of a start-up charter school. If both effects are present, we would expect magnitudes of the coefficients on priority zone charter school concentric ring distance variables to be larger than those for non-priority zoned start-up charter schools. Our results generally support the two effects listed above.²⁸

Most of this support comes from results obtained from analyzing subsamples of data from the metro-Atlanta area. We find that charter schools with priority enrollment zones in the city of Atlanta have a stronger effect on property values than charter schools without priority zones in the Atlanta suburbs. For instance, in the city of Atlanta, priority-zoned charter schools increased property values by 8.2 percent in the smallest concentric ring specification of 0.3 miles compared to 4.2 percent for non-priority charter schools in the smallest concentric ring specification of one-half mile in the Atlanta suburbs.

These results are consistent with the limited literature that has found that charter schools affect property values. Patrick (2015) found evidence that households value the increased probability of admission to charter schools in priority one admissions zones, with premiums on home prices in the priority one zone ranging from 7-13 percent. Others have found that being near a school has a positive effect on property values. For example, Kane et al. (2003) found that being one mile further away from an elementary school was associated with a 1 to 5 percentage point decline in home values.

Additionally, it is possible that the entrance of a charter school to the region lessens the traditional link between home prices and TPS elementary school quality, referred to as decoupling. Our results also offer some evidence that decoupling may be occurring in the Atlanta suburbs near charter schools without priority attendance zones. First, our results show that properties in the Atlanta suburbs near start-up charter schools without priority zones are more valuable than those in the outer concentric ring of onehalf to one mile from the school. Second, the CRCT exceeds expectations variable is negative for these schools. These two results suggest that families value their start-up charter school option and now are less willing to pay to be in higher achieving TPS elementary school zones.

To further estimate the economic impact on the communities served by these charter schools, we estimated the effect on the average house in the area. In the city of Atlanta, the average house in a priority attendance zone within 1.8 miles of a start-up charter school sold for \$145,170 from 2004 to 2013. The house was roughly 1,500 square feet, with three bedrooms and two bathrooms. If this average house were in the 0.3-mile concentric ring of a priority-zoned school, we would expect it to sell for \$11,846 more than the same house located in the second concentric ring of 0.3-0.6 miles. In the Atlanta suburbs, the average house sold for \$139,206 from 2004 to 2013. The house was also roughly 1,500

²⁸ Again, caution must be used in applying these results to individual start-up charter schools existing or proposed, as the results presented here are average effects.

square feet, with three bedrooms and two bathrooms. If this average house were in the half-mile concentric ring of a priority-zoned school, we would expect it to sell for \$5,888 more than the same house located in the second concentric ring of one-half to one mile from the charter school. Table 6 shows the economic impact of these positive effects for both the city of Atlanta and the Atlanta suburbs on the average home for the three specifications.

	AVERAGE HOME SALE PRICE IMPACT			
	ATLANTA CITY START-UP PRIORITY ZONE ONLY	ATLANTA SUBURB START-UP NON-PRIORITY ZONE ONLY		
CONCENTRIC RING DISTANCE				
Within 0.3mi v 0.3mi-0.6mi	+ \$11,846	NA		
Within 0.5mi v 0.5mi-1mi	+ \$11,643	+ \$5,888		
Within 0.7mi v 0.7mi-1.4mi	+ \$1,626	+ \$8,366		
Within 0.9mi v 0.9mi-1.8mi	NA	+ \$3,661		

Table 6: Economic Impact of Start-Up Charter Schools City of Atlanta and Atlanta Suburbs

Source: Authors' calculations

The results from the analysis of the Pataula Charter Academy suggest that the charter school has had some positive effect on local property values. However, because of the lack of traditional statistical significance, we cannot be certain of the size of this effect. Even if the true size of the effect were similar in magnitude to that found in the city of Atlanta or the Atlanta suburbs, the economic benefit to the community served would likely be smaller. First, houses in Pataula's five-county attendance zone are less expensive, with the average three-bedroom, two-bathroom house selling for \$75,210 from 2004 to 2013. Note that the average house was slightly larger than in the city of Atlanta at 1,700 square feet. Second, the Pataula region has considerably fewer housing units and home sales than in the metro-Atlanta area. The Pataula Charter Academy may have other less tangible effects on the five-county region, but our analysis of home sales cannot identify them.

Our results suggest that households value access to charter schools, conditional on geographic location and the existence of a priority attendance zone. While individual homeowners may benefit from the increase in a home's value, there is also a benefit to the communities served by these start-up charter schools. Local public services, including traditional public schools and public safety, rely on property tax revenue for funding. The increased home values near a start-up charter school increase the local tax base. Thus, while successful start-up charter schools benefit the students attending them and their families, there appears to be benefits to the broader community served as well.

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Appendix A: Detailed Criteria for Matching Counties

Data on the number of owner-occupied units and the median value of owner-occupied units came from the Georgia statistics system and are the average 2008-12 values. Housing density data are also from the Georgia statistics system for the year 2013.

1) SIMILAR GEOGRAPHIC REGION

The five Pataula charter school attendance zone counties are in two Department of Community Affairs regions: Southwest Georgia and River Valley. We also include the Southern Georgia region to broaden the potential counties eligible for matching.

2) SIMILAR NUMBER OF OWNER-OCCUPIED HOUSING

The median number of owner-occupied houses in the Pataula charter school attendance zone is 1,320, with a mean of 1,542. Note that two counties in the Pataula attendance zone have less than 1,000 owner-occupied units each: Baker with 953 and Clay with 873. Early County has the largest number of owner-occupied housing with 2,708 units. To best match the Pataula attendance zone, we exclude all counties that have more than 3,000 or fewer than 800 owner-occupied housing units.

3) SIMILAR VALUE OF OWNER-OCCUPIED HOUSING

The Pataula attendance zone median owner-occupied housing unit value was \$74,200, with mean of \$71,450. To find counties with similar median values, counties that had values within 15 percent of the median are selected. This range is \$63,070 to \$85,330.

4) SIMILAR VALUE OF HOUSING DENSITY

We use housing density to try to match counties with similar styles of development. The Pataula attendance zone has a median density of 10 housing units per square mile, with a maximum of 10.6 and a minimum of 4.7. Thus, we exclude any counties that have densities 50 percent above the maximum or 50 percent below the minimum. This leaves 10 counties: Atkinson, Charlton, Clinch, Irwin, Marion, Miller, Talbot, Taylor, Terrell and Turner.

The goal of the first four criteria is to find counties that are similar to the Pataula attendance zone counties. Once those counties are identified, we want to match up the counties that are similar in residential values prior to the opening of the charter school in 2010. The final step is to pull the residential assessed values (40 percent valuations) and population and calculate a per capita digest value.

Each of the five Pataula attendance zone counties is matched with a similar county from the 10 above based on the absolute value of the average difference in per capita values from 2005 to 2010. Some counties have several matches that are relatively close and that also overlap with other counties in the Pataula attendance zone. Researcher judgment is used to pick counties that are the most similar across the prior criteria as well as the matching criteria to select from these similar counties. The five matching counties selected were Atkinson, Clinch, Miller, Terrell and Turner.

Appendix B: Charter School List

- Amana Academy
- Atlanta Heights Charter School
- Atlanta Neighborhood Charter School (ES)
- Atlanta Neighborhood Charter School (MS)
- Baconton Community Charter School
- Bishop Hall Charter School
- Brighten Academy
- Charles R. Drew Charter School
- Charter Conservatory for Liberal Arts & Technology (CCAT)
- Cherokee Charter Academy
- Coastal Empire Montessori
- Coweta Charter Academy
- DeKalb Academy of Technology & the Environment (D.A.T.E.)
- DeKalb PATH Academy
- DeKalb Preparatory Academy
- Elite Scholars Academy
- Fulton Leadership Academy
- Fulton Science Academy High School
- Fulton Sunshine Academy
- Gwinnett Charter School of Advanced Mathematics, Science & Technology
- Hapeville Charter Middle School
- International Academy of Smyrna
- International Community School
- Ivy Preparatory Academy
- Ivy Preparatory Academy at Kirkwood for Girls
- Ivy Preparatory Young Men's Leadership Academy
- Kennesaw Charter Science and Math Academy
- KIPP Atlanta Collegiate
- KIPP South Fulton Academy
- **KIPP STRIVE Primary**
- KIPP STRIVE Academy
- **KIPP** Vision
- **KIPP Vision Primary**
- KIPP West Atlanta Young Scholars Academy (KIPP WAYS)
- Lake Oconee Academy
- Latin Academy Charter School
- Leadership Preparatory Academy
- New Life Academy of Excellence (two sites)

Odyssey School

Oglethorpe Charter School

Pataula Charter Academy

Savannah Classical Academy

The GLOBE Academy

The Intown Academy

The Kindezi School

The Main Street Academy (two sites)

The Museum School of Avondale Estates

Tybee Island Maritime Academy

Unidos Dual Language Charter School

Utopian Academy for the Arts

Wesley International Academy

Westside Atlanta Charter School

Appendix C: Results Full Tables

Tables C1- C5 show the results from the model specified in Equation 1, which controls for property characteristics, neighborhood effects, locally zoned school performance, the age of the start-up charter school and when the home sale occurred. The model performs as expected on the control variables for housing characteristics, illustrating the relationship between such factors as home square footage and sale price.

We discuss Table C1, showing results for priority zoned schools, below as the results are similar in the other tables. The square footage is positively related to sales price with an expected coefficient size. In general, 100 finished square feet is expected to increase the price of a home by about 2 percent. The effect of lot size on sales prices is extremely small and generally statistically insignificant, likely due to the inclusion of square footage and other housing characteristics. The number of bathrooms is statistically significantly related to higher sales prices. This is a relatively large coefficient, with an additional bathroom adding 10-13 percent to the price of a house. The number of bedrooms is positive and but not statistically significant. Unfinished basement square feet is slightly negatively related to sales price, most likely because for a given square footage of home, a purchaser would prefer finished square feet of basement. Fireplaces, garages and recent renovations are all statistically significant and positively related to sales price, suggesting a preference for newer homes after controlling for the condition of the home.

The two education-related variables included here and that have been studied in the literature, the age of the start-up charter school and the achievement level of the zoned traditional public school as measured by the CRCT exceeds expectations variable, also have the expected signs and are generally statistically significant. The CRCT exceeds expectations variable is statistically significant and positively related to sales prices of homes, which is an expected finding. The age of the start-up charter is also positive but only statistically significant in specification 3, suggesting a weak positive relationship to the price of the home. The values for the R-squared, a measure used to explain how much of the variation in the dependent variable is explained by the model, are about 65-68 percent for all three specifications. These levels of R-squared provides evidence that the model is appropriately specified. The results for the other subsamples follow.

Table C1. Priority Zoned Schools Only

VARIABLES	LOG SALES PRICE	LOG SALES PRICE	LOG SALES PRICE	
Within .3mi v .3mi6mi	0.0535** -0.0262			
Within .5mi v .5mi-1mi		0.0353* -0.0191		
Within .7mi v .7mi-1.4mi			-0.0234 -0.0192	
Percent Exceed CRCT	0.00896***	0.00537***	0.00728***	
	-0.00151	-0.000954	-0.000788	
Start-Up Age in Years	0.0149	0.0315***	0.0283***	
	-0.0287	-0.011	-0.00523	
Square Feet	0.000243***	0.000239***	0.000247***	
	-1.87E-05	-1.56E-05	-1.31E-05	
Lot Size	-3.58e-08*	-3.32e-08*	9.69E-09	
	-2.13E-08	-1.90E-08	-2.87E-08	
Number of Bathrooms	0.0972***	0.132***	0.133***	
	-0.0156	-0.0118	-0.00964	
Number of Bedrooms	0.0235	0.00264	0.00247	
	-0.0156	-0.0101	-0.00812	
Basement Square Feet (unf.)	-8.75e-05***	-9.80e-05***	-0.000106***	
	-2.58E-05	-1.69E-05	-1.38E-05	
Below Average Condition	0.0598	0.0487	0.0343	
	-0.0542	-0.0389	-0.0299	
Above Average Condition	0.0256	0.0065	0.0286**	
	-0.0298	-0.0184	-0.0144	
Year Built	0.000526	0.000623***	0.000145	
	-0.000384	-0.000177	-0.000184	
Fireplace	0.118***	0.108***	0.0851***	
	-0.0208	-0.0141	-0.0113	
Garage	0.129***	0.0703***	0.0668***	
	-0.0253	-0.0169	-0.0133	
Recent Renovation	0.0472*	0.0409**	0.0294**	
	-0.0258	-0.0175	-0.0142	
Month Year Fixed Effects	Y	Υ	Y	
Block Group Fixed Effects	Υ	Y	Y	
Constant	10.80***	10.95***	11.69***	
	-0.8	-0.395	-0.3	
Observations	6,751	14,846	23,380	
R-squared	0.688	0.668	0.651	

Robust standard errors below coefficient

*** p<0.01, ** p<0.05, * p<0.1

Table C2. Excluding Priority Zoned Schools

VARIABLES	LOG SALES PRICE	LOG SALES PRICE	LOG SALES PRICE	
Within .5mi v .5mi-1mi	-0.00386 -0.0143			
Within .7mi v .7mi-1.4mi		0.00985 -0.0131		
Within .9mi v .7mi-1.8mi			0.0206* -0.0109	
Percent Exceed CRCT	-0.00305***	-0.0011	0.000641	
	-0.000821	-0.000679	-0.000579	
Start-Up Age in Years	-0.0922***	-0.0582***	-0.0182***	
	-0.0251	-0.012	-0.00454	
Square Feet	0.000305***	0.000152***	0.000162***	
	-1.46E-05	-5.24E-05	-4.30E-05	
Lot Size	-8.88e-09***	-2.17E-09	3.41E-09	
	-3.29E-09	-6.96E-09	-1.22E-08	
Number of Bathrooms	0.138***	0.183***	0.169***	
	-0.0113	-0.0209	-0.0186	
Number of Bedrooms	0.0225**	0.0695***	0.0519***	
	-0.011	-0.0147	-0.0107	
Basement Square Feet (unf.)	2.71e-05**	3.70e-05***	3.59e-05***	
	-1.09E-05	-8.29E-06	-6.16E-06	
Below Average Condition	-0.0078	-0.104***	-0.148***	
	-0.0332	-0.0266	-0.0224	
Above Average Condition	0.0821***	0.0561***	0.0628***	
	-0.0177	-0.0126	-0.0102	
Year Built	-0.000579***	-0.000525***	-0.000503***	
	-8.95E-05	-7.68E-05	-6.09E-05	
Fireplace	0.0383**	0.0156	0.011	
	-0.0155	-0.0113	-0.00892	
Garage	0.122***	0.127***	0.120***	
	-0.0133	-0.0108	-0.00835	
Recent Renovation	0.0231	0.0509***	0.0869***	
	-0.0245	-0.0191	-0.0162	
Month Year Fixed Effects	Y	Y	Y	
Block Group Fixed Effects	Υ	Y	Y	
Constant	12.07***	11.70***	11.86***	
	-0.278	-0.196	-0.204	
Observations	11,479	20,645	31,393	
R-squared	0.757	0.763	0.76	

Robust standard errors below coefficient

*** p<0.01, ** p<0.05, * p<0.1

VARIABLES	LOG SALES PRICE	LOG SALES PRICE	LOG SALES PRICE	
Within .3mi v .3mi6mi	0.0816** -0.0334			
Within .5mi v .5mi-1mi		0.0802*** -0.0228		
Within .7mi v .7mi-1.4mi			0.0112 -0.0243	
Percent Exceed CRCT	0.0102***	0.00446***	0.00656***	
	-0.00188	-0.00115	-0.000971	
Start-Up Age in Years	0.0111	0.0341***	0.0310***	
	-0.029	-0.0111	-0.00526	
Square Feet	0.000308***	0.000249***	0.000264***	
	-2.49E-05	-2.34E-05	-2.12E-05	
Lot Size	3.59E-06	4.61E-07	2.87E-07	
	-2.42E-06	-1.84E-06	-8.38E-07	
Number of Bathrooms	0.0806***	0.112***	0.111***	
	-0.0204	-0.0155	-0.013	
Number of Bedrooms	0.0382**	0.0159	0.00802	
	-0.0183	-0.0119	-0.01	
Basement Square Feet (unf.)	-7.41e-05**	-6.01e-05***	-7.89e-05***	
	-3.03E-05	-2.18E-05	-1.81E-05	
Below Average Condition	-0.0362	0.00385	-0.0275	
	-0.0643	-0.0454	-0.0338	
Above Average Condition	0.00486	-0.0143	0.00955	
	-0.0336	-0.0213	-0.017	
Year Built	0.00211***	0.00319***	0.00263***	
	-0.000519	-0.000362	-0.000295	
Fireplace	0.122***	0.107***	0.0913***	
	-0.0234	-0.0164	-0.0132	
Garage	0.100***	0.0535***	0.0669***	
	-0.0302	-0.0206	-0.0168	
Recent Renovation	-0.0125	-0.0306	-0.0330*	
	-0.0299	-0.0212	-0.0179	
Month Year Fixed Effects	Y	γ	Y	
Block Group Fixed Effects	Υ	Y	Y	
Constant	6.973***	4.685***	6.460***	
	-1.026	-0.713	-0.578	
Observations	5,049	11,046	16,612	
R-squared	0.631	0.614	0.594	

Table C3. Atlanta City Start-Up Priority Zone Only

Robust standard errors below coefficient

*** p<0.01, ** p<0.05, * p<0.1

VARIABLES	LOG SALES PRICE	LOG SALES PRICE	LOG SALES PRICE	
Within .3mi v .3mi6mi	0.0193 -0.0672			
Within .5mi v .5mi-1mi		-0.0909* -0.0495		
Within .7mi v .7mi-1.4mi			-0.0692* -0.0416	
Percent Exceed CRCT	-0.00265	0.0038	0.000402	
	-0.00485	-0.00292	-0.00252	
Start-Up Age in Years	0.0185	-0.0919	-0.0564	
	-0.113	-0.0601	-0.041	
Square Feet	0.000260***	0.000254***	7.04e-05***	
	-7.05E-05	-3.81E-05	-1.74E-05	
Lot Size	8.04E-07	2.76E-06	-3.27E-07	
	-3.73E-06	-1.83E-06	-2.29E-07	
Number of Bathrooms	0.165***	0.132***	0.132***	
	-0.0474	-0.0264	-0.0211	
Number of Bedrooms	-0.000738	0.00272	0.0679***	
	-0.0383	-0.0244	-0.018	
Basement Square Feet (unf.)	1.32E-05	-5.31E-05	-1.50E-05	
	-7.25E-05	-4.25E-05	-3.18E-05	
Below Average Condition	0.203*	0.0703	-0.0847	
	-0.114	-0.0822	-0.0632	
Above Average Condition	0.155*	0.0905*	0.107***	
	-0.0878	-0.0504	-0.0391	
Year Built	0.00151	0.00336***	0.00459***	
	-0.00144	-0.000795	-0.000606	
Fireplace	0.0168	0.0212	0.0103	
	-0.0571	-0.0369	-0.0283	
Garage	-0.00435	0.0255	0.0518*	
	-0.0644	-0.0421	-0.0314	
Recent Renovation	-0.0763	-0.124***	-0.112***	
	-0.0688	-0.0413	-0.033	
Month Year Fixed Effects	Y	Υ	Y	
Block Group Fixed Effects	Υ	Υ	Y	
Constant	8.023***	4.430***	3.421***	
	-2.871	-1.579	-1.178	
Observations	823	1,924	3,145	
R-squared	0.799	0.784	0.79	

Table C4. Atlanta City Start-Up Non-Priority Zone Only

Robust standard errors below coefficient

*** p<0.01, ** p<0.05, * p<0.1

VARIABLES	LOG SALES PRICE	LOG SALES PRICE	LOG SALES PRICE	
Within .5mi v .5mi-1mi	0.0423*** -0.0148			
Within .7mi v .7mi-1.4mi		0.0601*** -0.0127		
Within .9mi v .9mi-1.8mi			0.0263** -0.0112	
Percent Exceed CRCT	-0.00314***	-0.000731	-0.000355	
	-0.000837	-0.000631	-0.000543	
Start-Up Age in Years	-0.0438**	-0.0457***	-0.0233***	
	-0.0171	-0.0104	-0.0042	
Square Feet	0.000272***	0.000246***	0.000269***	
	-1.48E-05	-1.76E-05	-1.42E-05	
Lot Size	-4.85E-09	-2.86E-09	-6.51E-11	
	-3.01E-09	-3.16E-09	-6.72E-09	
Number of Bathrooms	0.0701***	0.0639***	0.0420***	
	-0.0119	-0.00972	-0.00843	
Number of Bedrooms	0.0629***	0.0770***	0.0486***	
	-0.0116	-0.0086	-0.00679	
Basement Square Feet (unf.)	8.50e-05***	7.95e-05***	7.51e-05***	
	-1.07E-05	-7.46E-06	-5.82E-06	
Below Average Condition	-0.0454	-0.0947***	-0.126***	
	-0.032	-0.0249	-0.0219	
Above Average Condition	0.0896***	0.0684***	0.0946***	
	-0.0168	-0.0117	-0.00963	
Year Built	0.00485***	0.00574***	0.00607***	
	-0.000587	-0.000458	-0.000368	
Fireplace	0.0420**	0.0111	0.0066	
	-0.0181	-0.0127	-0.00992	
Garage	0.124***	0.101***	0.0849***	
	-0.0149	-0.0107	-0.00848	
Recent Renovation	0.0523	0.0737***	0.122***	
	-0.0359	-0.0265	-0.0213	
Month Year Fixed Effects	Y	γ	Y	
Block Group Fixed Effects	Υ	Υ	Υ	
Constant	1.386	-0.585	-0.836	
	-1.159	-0.907	-0.731	
Observations	8,394	15,330	23,533	
R-squared	0.758	0.775	0.775	

Table C5. Atlanta Suburb Start-Up Non-Priority Zone Only

Robust standard errors below coefficient

*** p<0.01, ** p<0.05, * p<0.1

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About the Center for State and Local Finance

The Center for State and Local Finance's (CSLF) mission is to develop the people and ideas for next generation public finance by bringing together the Andrew Young School's nationally-ranked faculty and the broader public finance community. CSLF conducts innovative, nonpartisan research on tax policy and reform, budget and financial management, education finance, and economic development and urban policy. Additionally, it provides premier executive education in public finance for state and local finance officials and works with local and state partners on technical assistance projects on fiscal and economic policy.

CSLF maintains a position of neutrality on public policy issues. However, in order to protect their academic freedom, authors may express a wide range of viewpoints in CSLF's publications. The research, interpretations or conclusions in CSLF publications should be understood to be solely those of the author(s).

For more information on the Center for State and Local Finance, visit our website at: cslf.gsu.edu.

About the State Charter Schools Commission of Georgia

The State Charter Schools Commission of Georgia is a state-level, independent charter school authorizing entity. The commission has the power to approve or deny petitions for commission charter schools and renew, nonrenew, or terminate commission charter school petitions in accordance with Georgia law.

While the Commission's duties are set forth in law and extend beyond simply authorizing schools, the Commission's principal obligations include:

- Reviewing charter school petitions for commission charter schools and assisting in the establishment of commission charter schools throughout Georgia;
- Developing and promoting best practices for charter schools and charter school cosponsors to ensure that high-quality charter schools are developed and encouraged;
- Promoting high standards of accountability for commission charter schools; and
- Monitoring and annually reviewing the academic and financial performance, including revenues and expenditures, of commission charter schools and holding the schools accountable for their performance pursuant to the charter.

APRIL 18, 2018

THE CENTER FOR STATE AND LOCAL FINANCE

The Effects of Start-Up Charter Schools on Academic Milestones

Peter Bluestone Nicholas Warner



ANDREW YOUNG SCHOOL CENTER FOR STATE & LOCAL FINANCE

About the Report Series

This is the final study in a three-part series commissioned by the State Charter Schools Commission and performed by the Center for State and Local Finance. The series analyzes the economic impact of start-up charter schools on individuals that attend them, the communities they serve, and on the state of Georgia as a whole. Examining the economic impact of charter schools on individuals that attend them and the communities in which the schools are located, has been previously undertaken in only a few other states. This series of reports, focusing on the Georgia experience with start-up charter schools, makes a meaningful contribution to this literature. Reports one and three examine the economic impact that start-up charter schools have on students. The second report examines the economic impact of start-up charter schools on the communities in which they are located through changes to property values.

The first report, *Review of Charter Schools' Effects on Student Achievement and Life Outcomes*, summarized the academic literature on the impact of charter schools on academic development and achievement as well as the impacts achievement can have in the long run. The effect of charter school attendance on student academic achievement and life outcomes has been long debated and extensively researched. Most commonly, researchers have used changes in tests scores to measure student achievement, yielding mixed results: Studies estimating changes in student achievement across multiple schools have found no, small positive, or even small negative effects of charter school enrollment. In addition to studies of academic performance, an emerging literature is providing some evidence that charter schools have been able to improve student life outcomes, including high school graduation rates and earnings.

The second report, *Effect of Start-Up Charter Schools on Nearby Property Values*, examines the economic impact of start-up charter schools on the communities surrounding them by analyzing the effects on real property values. We analyze the variation in sales prices of houses across school attendance zones, as well as the variation in house values based on the distance from the start-up charter schools. We find that for start-up charter schools with priority attendance zones, households are willing to pay a premium to be within one half-mile of the school; this premium is larger in the city of Atlanta. For start-up charter schools in the Atlanta suburbs.

The research in this third report supports the existing literature on student life outcomes summarized in report one. We find that attending a Georgia start-up charter high school increases the likelihood of high school graduation and those students are more likely to enroll in college than comparison groups of students who attended charter middle schools but then switched to traditional public high schools (control group). The students who attend a start-up charter high school are also more likely to persist in college and are more likely to earn a college degree or certificate than the control group. These academic milestones, such as high school graduation, college enrollment and degree completion, are predictive of a student's future outcomes in the labor market.

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Introduction

Since the first charter school opened in 1992, 42 states and the District of Columbia have adopted provisions allowing charter schools to operate (Epple et al. 2015). Advocating reform to struggling public education systems, the proponents of charter schools envisioned that charter schools' autonomy would allow charter schools to innovate and improve educational outcomes for their students. Proponents also hoped that the increased competition for students would spur improvements in traditional public schools (TPS). Improved academic performance in both settings is important as research has found that it leads to better economic outcomes for both individuals and communities (Hanushek and Kimko 2000; Card 1999).

The effect of charter school attendance on students' academic achievement and life outcomes has been long debated and extensively researched; research on charter schools improving student achievement has been conducted in at least 27 states (Cremata et al. 2013). Typically, researchers have used changes

in tests scores, from elementary and middle school grades, to measure student achievement. This extensive research on the effectiveness of charter schools has yielded mixed results (see Bluestone 2016 for a review of the literature). Less is known about the impact that these schools have on other metrics of student success either in high school or college.

This report examines the impact of Georgia's start-up charter schools on students' academic milestones — high school graduation, college enrollment and degree completion. These critical educational achievements are predictive of a student's future outcomes in the labor market. We use Georgia's Academic and Workforce Analysis and Research Data System (GA•AWARDS), housed by the Governor's Office of Student Achievement, for this study. This We find that attending a Georgia charter high school increases the likelihood of high school graduation by roughly 4 percentage points and that such students are 6 percentage points more likely to enroll in college than comparison groups of students who attended charter middle schools but then switched to traditional public high schools. The students who attend a charter high school are also about 8 percentage points more likely to persist in college for two consecutive semesters and 2 percentage points more likely to earn a college degree or certificate than the control group.

longitudinal data system starts collecting data on Georgia public school students upon their entrance to Georgia's Pre-K Program, if they participate, all the way through their role in Georgia's labor market.

We use an average treatment effects model to isolate the differences in critical educational outcomes between students who were enrolled in start-up charter high schools and a group of matched students who attended traditional public high schools. All the students studied attended a charter middle school; this sample restriction controls for selection effects, which would otherwise bias the results. We find that attending a Georgia charter high school increases the likelihood of high school graduation by roughly 4 percentage points and that such students are 6 percentage points more likely to enroll in college than comparison groups of students who attended charter middle schools but then switched to traditional public high schools (the control group). The students who attend a charter high school are also about 8 percentage points more likely to persist in college for two consecutive semesters and 2 percentage points more likely to earn a college degree or certificate than the control group.

These findings are significant for the labor market and economy, as there is an earnings premium associated with reaching these academic milestones. For instance, the U.S. Bureau of Labor Statistics finds that workers who graduate from college earn on average 36 percent more per week than those with only a high school diploma. These additional earnings have a positive economic impact on the communities in which they are spent.

The report is organized as follows. The types of charter schools in Georgia are briefly reviewed next. The third section discusses the economic theory on the link between academic achievement and economic impact. The fourth section summarizes the measures used in the literature to assess charter school success. The fifth section examines data and research methods. The sixth section reviews summary statistics, and the seventh section describes model specification, results and robustness checks. The concluding section suggests areas for future research.

Charter Schools in Georgia

While charter schools are public schools, two key factors differentiate them from traditional public schools. First, rather than children being assigned to a specific public school, parents can choose whether to send their children to a charter school. Second, charter schools have increased flexibility in how they educate students in exchange for increased accountability. The flexibility pertains to both state and district regulations that govern operations as well as the nature of the educational programs provided. Charter schools can differ from traditional public schools in several ways, such as the length of the school day, mandatory summer school, the instructional methods offered, and so forth.

Per the 2017-18 Georgia Charter Schools Annual Report, 113 charter schools were operating in Georgia at the start of the 2017-18 school year (not including those in charter system schools). These schools may be divided into two broad types (Georgia Department of Education 2014; Types of Charters):

• **Start-Up Charter School:** A new school created by a petition made by a nonprofit governing board. Startup charter schools may determine their own attendance zones, including priority attendance zones.

- **Conversion Charter School:** A charter school that existed as a local public school prior to becoming a charter school. Entrance into conversion charter schools is usually guaranteed for students residing within the school attendance boundaries as determined by the local school board.
- Charter System School: A charter system is a local school district that operates under a charter between the school district as the charter petitioner and the State Board of Education. Schools in a charter system are different from conversion and start-up charter schools. The school district, not the school and school governing board, has the contract with the state. Thus, schools in charter systems are generally more similar to a traditional public school and operate in a comparable manner. For instance, the Atlanta Public School district is now a charter system.

At the start of the 2017-18 school year, charter school students (not including charter systems) represented 4.9 percent of all K-12 public school students in Georgia. There are considerably more schools in charter systems and thus more students. Due to the similarities conversion charters schools and charter systems have to traditional public schools, we restrict our analysis to start-up charter schools in this report.

The Economic Theory of Academic Achievement and Economic Impact

This study relies on the theory that academic achievement leads to improved job outcomes, which make a positive economic impact on the community. Economic theory has long held that increased business investment in new machines and equipment (capital investment) fosters economic growth. In 1962, economist Gary Becker expanded the concept of capital investment to include schooling and training.

... higher educational attainment leads to substantially higher lifetime earnings ... Economic theory holds that better-educated workers are more productive, which can lead to both economic growth, improving the larger economy, and higher wages, an economic benefit to individuals. Spending on schooling and training is now commonly referred to as investing in human capital.

Since Becker published his article, the literature on human capital has grown dramatically and fits into two broad categories: the macroeconomic effects of education on countries' growth rates and the higher earnings associated with individuals' investment in education. While both areas of research have been fraught with debates about appropriate research methods, there is consensus

on two broad outcomes. First, in the macroeconomic setting, better schooling, measured by cognitive development in a country, is related to greater economic growth (Hanushek and Kimko 2000; Hanushek and Woessmann 2012). Second, from the perspective of individuals, higher educational attainment leads to substantially higher lifetime earnings (Card 1999; Heckman et al. 2006). This study focuses on the second category, primarily on educational attainment.

Charter Schools: Measures of Success Used in the Literature

This section explores the empirical literature on charter schools' effects on academic achievement, graduation rates, wages and other life outcomes. The discussion is relatively brief and limited to high-quality studies that use methods relevant to this study. (For a thorough discussion of this literature, see Bluestone et al. (2016)).

For charter schools to have a measurable economic impact, they need to improve outcomes for students later in life. Charter schools that increase the percentage of students who graduate from high school, attend college, obtain degrees and earn higher salaries will have positive economic impacts on their communities. A recent stream of the literature examines the potential effects that charter schools have on these outcomes. Additionally, many studies examine the role that charter schools play in academic achievement, which we outline first.

ACADEMIC ACHIEVEMENT

An extensive body of work explores the effects that charter schools have on academic achievement, as measured by performance on standardized tests. This rich literature has measured charter school effects on academic performance at the elementary and middle school levels. Many of these studies rely on a lottery research design.

The literature on how charter schools affect student achievement is contentious. Many of the studies using the lottery method provide strong evidence that certain charter schools can improve student achievement. Because students and their parents choose to enroll in charter schools, any study that compares charter students to traditional public school students has an inherent selection bias issue. Consequently, many studies that attempt to pinpoint the impacts of charter school attendance rely on a lottery research design, which takes advantage of the random selection that an attendance lottery provides in oversubscribed charter schools. Researchers compare the performance of students chosen for the charter school to that of students not chosen (and who consequently attend a traditional public school). When schools that operate in varying contexts and areas are studied together, even when using the lottery method as Gleason et al. (2010) did, the effects on average tend to be small or zero. Research shows that this low average effect is due to the variability in effects across

Student achievement has been firmly linked to better life outcomes such as increased high school graduation rates and higher wages; consequently, the effects found in this literature are a reasonable predictor of better economic outcomes for students later in life.

schools. More recent studies that have tried to uncover the source of this variation suggest that charter schools that serve disadvantaged students — typically ones in urban settings that focus on strict

discipline, tutoring and longer school days (often referred to as the No Excuses model in the literature) — do improve student achievement. Other types of charter schools have not been found to outperform traditional public schools in any consistently measurable way.

Student achievement has been firmly linked to better life outcomes such as increased high school graduation rates and higher wages; consequently, the effects found in this literature are a reasonable predictor of better economic outcomes for students later in life. (For instance, see Angrist et al. (2016), Sass et al. (2016) and Dobbie and Fryer (2013).)

OTHER OUTCOMES

Studies testing the effect of attending charter schools on outcomes that directly relate to economic impacts such as graduation rates, higher education milestones and wage effects have all been published since 2010. This makes sense because the first classes of charter school students have only recently begun graduating from high school, so there are limited numbers of charter school alumni for which these outcomes can be measured. Also, the data must be available for recent years to capture both attendance at charter schools and observable outcomes post high school graduation. While the literature is not well established, the studies that have been able to track students into the workforce find positive effects from enrollment in a charter school on graduation rates, education outcomes and wage effects.

Some studies have found that enrollment in charter high schools increases the ... they found chances of high school graduation and college attendance (Booker et al. 2010; that charter Clark et al. 2015). Unlike test scores, high school graduation and earnings immediately after graduation are one-time events; any study of charter schools' enrollment effects on these outcomes cannot rely on multiple observations for a student predicted over time to help control for potential charter school selection bias, inherent longer college when families chose whether to attend a charter school. To account for such persistence bias, Booker et al. (2010) considered only students who had previously attended and higher a charter middle school.¹ In a follow-up study, similarly designed except with a earnings . . . matching protocol implemented to further correct for any charter selection bias, the authors found similar results for high school graduation and college

attendance. In addition, they found that charter enrollment predicted longer college persistence and higher earnings (Sass et al. 2016).

Two lottery-style studies conducted on oversubscribed charter schools in Boston and Harlem found positive effects of charter enrollment on some noncognitive outcomes (Angrist et al. 2016; Dobbie and Fryer 2013). Charter schools were found to increase the chances that a student would enroll in a four-year college rather than a two-year college, but the researchers found no evidence that the charter schools increased the likelihood of high school graduation (Angrist et al. 2016). The students who

¹ Middle school enrollment grades can vary between school districts. For the purposes of this report, middle school includes grades 6-8.

attended Harlem's charter schools were more likely to enroll in college, girls were less likely to become pregnant as teens, and male students were much less likely to be incarcerated than students who participated in the lottery but attended Harlem's traditional public schools (Dobbie and Fryer 2013).

The few studies that look at broader outcomes such as graduation rates and earnings are recent and focus only on schools in Chicago, New York, Boston and Florida (e.g., Angrist et al. 2016; Dobbie and Fryer 2013; Sass et al. 2016). However, these studies might provide the best evidence that charter schools are having positive economic impacts on communities and individuals through improved academic achievement.

Data and Research Methods

This analysis attempts to establish a causal relationship between ninth-grade attendance at a start-up charter school in Georgia and the achievement of certain critical academic outcomes that are highly

predictive of better economic outcomes for students in Georgia. For this study, we measure high school graduation, postsecondary enrollment, persistence in postsecondary education, and college or technical school completion. Due to the timing of this study and when the charter high schools in Georgia opened, we can only report limited data on postsecondary degree attainment and labor market outcomes.

We rely on the GA•AWARDS data set. These data, first established through the Race to the Top statewide longitudinal data system grant, are generated by many state education and workforce agencies and the university systems. The data, which are housed and maintained by the Governor's Office of Student Achievement, include information on Georgia's students from enrollment in pre-K through their entrance into the labor market for the years 2007-16. The student-level dataset contains information on students' performance on tests, demographics, teachers, graduation outcomes, college and technical school enrollment, postsecondary degree attainment and any employment records.² Our analysis centers on the students the data allow us to follow, from a start-up charter school through high school graduation and beyond, to measure the effects that start-up charter schools have on these outcomes.

The data follow Georgia students throughout the full calendar years of 2007-16. Many start-up charter schools serve only elementary and

middle school-aged students, so the data system currently contains limited labor market outcomes for these students. Additionally, many of the start-up charter schools are newly established. Our analysis

² College enrollment includes out-of-state colleges and universities.

centers on the students the data allow us to follow, from a start-up charter school through high school graduation and beyond, to measure the effects that start-up charter schools have on these outcomes.

Isolating a causal relationship between attending a charter school and later life outcomes requires methods that account for the potential selection (empirical) bias from more interested students and families selecting into charter schools. To do so, we estimate average treatment effects within matched ninth-grade students attending start-up charter high schools (treatment) and traditional public schools or conversion charter high schools (control) — all of whom attended a start-up charter school for eighth grade. This method, frequently used in the literature, reduces the likelihood that neither selection into a charter school nor student population differences are influencing the findings. Our control group, therefore, is students who attended eighth grade at a charter middle school and then attended a traditional public high school; our treatment group consists of students who attended a charter middle school and continued into a start-up charter high school.

Individual charter schools differ in the legal framework under which they operate, complicating our analysis. Each school has its own curricular focus, instructional style and teachers. They follow different schedules and serve different communities. Because of these variations, much of the research on charter schools has been specific to a school or small set of schools within a given state, making it difficult to generalize the findings to other charter schools.

All the differences across charter schools create methodological complications when attempting to evaluate the performance of an individual school. Comparing the outcomes of students who attended a charter school to those who attended a traditional public school suffers from potential sample selection bias. By choosing to enroll, or attempting to enroll, in a charter school, a family and student are indicating intrinsic motivation and a potentially higher value placed on education than families and students who do not attempt to enroll. Any effect found in a study that does not correct for this potential selection bias could just be capturing the effect of the higher levels of motivation and value placed on education rather than the charter school's impact on the student. (For a full review of the literature on the effect of charter schools on student achievement and other life outcomes, see Bluestone et al. (2016).)

The extant research on charter schools has used multiple methods to account for this potential selection bias. The chosen method varies depending on the outcome being measured and the type of data available.³ Ideally, researchers would be able to select students and randomly assign them to a charter school or a traditional public school and then observe the differences in outcomes. However, that is not possible. The next best real-world alternative is referred to as a lottery-style research design. This research design takes advantage of the random selection that an attendance lottery provides in oversubscribed charter schools. Researchers can address selection bias by comparing the performance of

³ An excellent survey of the academic literature on charter schools and the various statistical methods used to correct for selection bias was recently conducted by Epple et al. (2015). They identified five methods used to correct for this potential bias: 1) fixed effect approaches, 2) a random lottery design, 3) matching procedures, 4) an ordinary least squares regression design and 5) instrumental variable approaches.

students chosen for the charter school to that of students not chosen (and who consequently attend a traditional public school). Thus, the comparisons of student outcomes only take place among individuals who wanted to attend that school, and as both groups are presumably similarly motivated, any difference can be attributed to the effect of attending the charter school. Lottery-style studies are not always practical, particularly if the schools of interest are not oversubscribed or lottery results are not available, as is the case for our study.⁴

Another approach to address selection bias is to use longitudinal pretreatment measures, usually test scores, when examining academic achievement. As students take tests repeatedly over many years, the change in test scores for individual students who move between traditional public schools and charters can be used to infer the impact of charter school attendance on student achievement. As individual student outcomes are observed, important student and family characteristics are controlled for. The validity of this method has recently been demonstrated by Furgeson et al. (2012) and Tuttle et al. (2013). This approach is also not possible for our study because we focus on long-term outcomes, which are one-time events after charter school enrollment.

Researchers have been confronted with these empirical limitations before and have devised a method to deal with them. To create a comparison group, they rely on students who attended a charter school in the eighth grade. The expectation is that this group of students will be similar in terms of unobserved family and student characteristics that would also be present in those who enroll in charter high schools (Booker et al. 2010; Sass et al. 2016).

The treatment students in this type of analysis remain enrolled in charter schools in ninth grade, whereas the control students attend traditional public schools for high school. This type of analysis also addresses selection bias by controlling for baseline student demographics and measures of ability, including eighth-grade test scores. Finally, a matching protocol is used to further control for unobserved characteristics and selection bias. A one-to-one nearest-neighbor covariate matching approach is used in which students in the treatment group are matched based on observable characteristics with a student who attended a traditional public high school in ninth grade.

This matched average treatment effects model is similar to that used in other studies (Booker et al. 2010; Sass et al. 2016). In our analysis, the students who attended a start-up charter in eighth grade represent the group of potentially studied students. The students who also attended a start-up charter in ninth grade are the treated group, and the students who remain (attending a traditional public high school or conversion charter school) are the potential matched control group students. Any effect found is between students and families who were all interested in and attended a charter school. The matching process ensures that the groups of students compared are similar in all possible ways except for charter

⁴ Additionally, oversubscribed schools often are the top-performing schools, so results may not be applicable to all charter schools.

high school attendance. We also perform several robustness checks to test the importance of the student-level matching criteria.⁵

Summary Statistics

GA•AWARDS provides comprehensive data on all students enrolled in Georgia's public education system as well as their placement in the workforce. This dataset includes where individual students attended eighth and ninth grade and their workforce information years later. Table 1 shows the relevant number of eighth-grade cohorts by type of school based on information in the GA•AWARDS data set. The table also includes the date each cohort reached various academic milestones, such as high school graduation. There has been considerable growth in the size of start-up charter school eighth-grade cohorts from school year 2006-07 to 2011-12. In 2006-07, there were 835 eighth-grade students in start-up charter schools; by 2011-12, there were 3,339.

	8TH GRADE COHORTS*			ON-TIME EDUCATIONAL ATTAINMENT		
SCHOOL YEAR	CONVERSION CHARTER	START-UP CHARTER	TRADITIONAL PUBLIC SCHOOL	HIGH SCHOOL GRADUATION CLASS	BACHELOR'S DEGREE – SPRING	WAGES SUMMER**
2006-07	1,892	835	129,270	2011	2015	2015
2007-08	1,758	1,337	126,528	2012	2016	2016
2008-09	1,782	1,473	125,321	2013	2017	2017
2009-10	1,898	2,425	126,395	2014	2018	2018
2010-11	1,861	2,084	125,383	2015	2019	2019
2011-12	1,954	3,339	129,160	2016	2020	2020

Table 1. Student Enrollment and Milestone Attainment Dates

*Non-duplicated student count of eighth grade students

**If an eighth grader completed high school and a bachelor's degree, both within four years, they could start working with a four-year degree the summer of this year.

Source: GA•AWARDS data

By comparison, there was not much growth in the eighth-grade conversion charter school attendance or in traditional public school eighth-grade attendance over the same period. For the school year 2006-07, there were 1,892 eighth graders enrolled 129,270 eighth-graders were enrolled in school year 2006-07, and 129,160 enrolled in 2011-12.

For this study, we are only interested in the eighth graders who attended start-up charter schools. As the GA•AWARDS dataset starts with the full calendar year 2007 and ends with calendar year 2016, it contains a limited number of observations for those eighth-grade cohorts that graduate college and enter the

⁵ The small number of start-up charter high schools has been an issue in previous research. However, due to the Georgia Cyber Academy, students who do not have a bricks-and-mortar charter high school close by now have the option of attending a charter high school. The effects of including the Georgia Cyber Academy in our study as a start-up charter school are discussed later in the report.

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workforce. Even if we assume optimistically that the relevant academic milestones are achieved on time, such as an eighth-grader completing high school in four years, enrolling in college and receiving a degree

four years later, we are limited to the eighth-grade cohorts of 2007 and 2008 to observe data on wages post-college graduation. Only the 2007 cohort would have more than two quarters of wage data. Thus, we primarily focus on other academic milestones linked to future wage outcomes, such as high school graduation, college enrollment and college persistence. We have three to five cohorts of eighth graders for whom we can track these milestones. As more data become available over time, direct wage comparisons will be possible.

Table 2 shows the number of eighth-grade students in the treatment and control group cohorts. The treatment group cohorts are composed of students who were enrolled in eighth grade in a start-up charter school and were enrolled in a start-up charter school in ninth-grade. The control group is made up of students who were enrolled in a start-up charter school in eighth ... we primarily focus on other academic milestones linked to future wage outcomes, such as high school graduation, college enrollment and college persistence.

grade but then were enrolled in a traditional public school or conversion charter school for ninth grade. The table tracks the relevant cohorts as they reach various academic milestones.

	TOTAL COUNT				
8TH GRADE COHORT	CONTROL*	TREATMENT**			
2007	694	141			
2008	1,223	114			
2009	1,263	210			
2010	1,976	449			
2011	1,372	712			
2012	2,267	1,072			
HIGH SCHOOL GRADUATION WITHIN 5 YEARS					
8TH GRADE COHORT	CONTROL*	TREATMENT**			
2007	439	91			
2008	604	71			
2009	707	144			
2010	975	250			
2011	943	500			
2012	1,281	603			
2 CONSECUTIVE SE	MESTERS OF COLLE	GE WITHIN 7 YEARS			
8TH GRADE COHORT	CONTROL*	TREATMENT**			
2007	370	80			
2008	503	60			
2009	556	119			
2010	769	200			
2011	720	370			

Table 2. Treatment and Control Cohorts and Milestones Attained

*Control are eighth grade start-up charter school students who go on to attend a traditional public school or conversion charter school for ninth grade.

**Treatment are eighth grade start-up charter school students that go on to attend a start-up charter high school for ninth grade.

Source: GA•AWARDS data

Table 2 shows that in both the treatment and control groups sizeable shares of students fail to reach various academic milestones. For instance, of the 694 students in the 2007 control cohort, only 439 of them graduated from high school within five years (63 percent), and only 370 (53 percent) enrolled in college and persisted for two consecutive semesters within seven years of being in eighth grade. These failure rates are similar in the treatment group of 141 students in the 2007 cohort: only 91 graduated from high school within five years (65 percent), and only 80 enrolled in college within seven years of being in eighth grade (57 percent). The magnitude of the failure rates is similar for the later cohorts, even as the number of students grows.

The treatment cohorts from 2007 to 2009 have limited observations, with most of these students coming from four schools: Baconton Community School; College, Careers, Arts and Technology (CCAT) School; Fulton Science Academy High School; and Lanier Career Academy. For instance, in the 2007 treatment cohort, 118 of the 168 students came from the four schools listed above. These four schools also are where most of the treatment students went to school in eighth grade (see Appendix for more details).

Table 3 shows the mean value for the various academic achievement and demographic characteristics of the treatment and control groups, after matching. The standardized mean difference indicates that we have good balance in our matches. The last column in the table shows the standardized mean difference before matching.⁶ This column shows the difference in the treatment population compared to all potential control candidates. Recall that potential control students are those that attended a start-up charter school for eighth grade but went on to a TPS high school for ninth grade. We briefly discuss these differences to illustrate the importance of the matching protocol to minimize bias as well as to highlight potential systemic differences between the treatment and control populations that require additional levels of inquiry.

	TREATMENT A MEANS – AFTE		STANDARDIZ DIFFERENCE	ED PERCENT IN MEANS**
8TH GRADE MEANS	TREATMENT COHORT	CONTROL COHORT	AFTER MATCHING	BEFORE MATCHING
English Score	839.83	840.83	-0.51%	-3%
Math Score	792.29	779.70	0.08%	10%
Reading Score	838.85	838.32	0.15%	2%
Free Lunch	61%	54%	-0.32%	14%
Gifted	3%	11%	0.00%	-31%
Limited English Proficient	2%	2%	0.00%	-4%
Disabled	9%	8%	0.14%	2%
Black	47%	53%	0.32%	-12%
Hispanic	3%	7%	-1.43%	-20%
White	45%	34%	0.08%	23%

Table 3. Summary Statistics for Treatment and Control Cohorts*

*All students attended a start-up charter school in eighth grade. The treatment cohort are those students who went on to a start-up charter high school for ninth grade. The control cohort went on to a traditional public school or conversion charter high school for ninth grade.

**Standardized percent difference takes into account the standard deviation of the means.

Source: GA•AWARDS data and author's calculations

The academic achievement measures, except for the math score, are fairly close before matching. The pool of potential control students on average scored 10 percent lower than the treatment students on

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⁶ Standardized mean differences are the difference between two observed averages after accounting for the variance in the underlying data used to compute the averages.

the Georgia math Criterion-Referenced Competency Test (CRCT). On average, the treatment group appears to have lower family incomes than the potential control group, with 14 percent more treatment students receiving free or reduced-price lunch than the potential control group. We note that the treatment group has a lower share of black and Hispanic students and a higher share of white students than the potential control group. For these demographic and achievement metrics, there does not seem to be any systematic pattern that would cause problems for the matching protocol. Finally, the treatment group had a 31 percent lower share of students participating in the statewide gifted program than the pool of potential control students. This difference is largely due to schools not opting to participate in the gifted programs, which have many treatment students. The nearest-neighbor matching protocol allows for this difference as any student described as "gifted" is matched to another "gifted" student for the analysis.

Model Specification and Results

In this section, we describe our modeling specification. As discussed earlier, our treatment group consists of students who attended a charter middle school for eighth grade and then a charter high school for ninth grade. The control group attended a charter middle school for eighth grade and then a traditional public high school for ninth grade. Note that our classification is determined only by ninth grade high school attendance and is not affected by whether the student continues on at the charter school for grades 10-12. This choice was made to avoid problems of selection bias associated with students transferring out of the treatment group. Thus, the estimates of charter high school effects are similar to "intent to treat" impact estimates, where treatment is completing high school at a start-up charter high school (by entering ninth grade in a start-up charter high school, students intend to receive the full treatment).

To further control for endogeneity, we follow a matching approach used in previous studies (Booker et al. 2011, Sass et al. 2016). We use a one-to-one nearest-neighbor covariate match in which observable characteristics from the treatment group (start-up charter ninth-grade enrollment) are matched with students attending traditional public high schools to create a control group.⁷ We then examine the difference in student outcomes between those in treatment relative to this counterfactual control group.

The causal nature of our treatment relies on an important assertion. The statistical process estimates the difference in the mean value of the outcome of interest for the treatment and control groups, for instance, the likelihood of high school graduation. For the treatment to have a causal relationship to any observed difference, the observable characteristics must be sufficient to make the counterfactual outcome — choosing to attend a traditional public high school — independent of the milestone of interest. To satisfy this condition, we choose only students who had enrolled in a charter school for eighth grade. Put another way, the model can be deemed causal only if upon leaving the charter school after

⁷ This matching protocol is implemented in Stata using the *teffects nnmatch* routine. Robust standard errors are used as recommended by Abadie and Imbens (2006) for this type of matching protocol.

eighth grade, a student's chance of graduating from high school is independent of their choice to attend a traditional public school, controlling for the observable characteristics using the matching process. For a technical discussion of these criteria, see Smith and Todd (2001). We later conduct a sensitivity analysis using modifications to both the treatment and control groups for the matching analysis approach to provide further evidence of the robustness of our results.

RESULTS

Table 4 presents the estimated impacts of charter high schools on students' subsequent achievement of three academic milestones: high school graduation, college entry and college persistence. For the analysis, we match on student demographics, inclusion in the English as a second language program (ESOL), special education program participation, and family income (proxied by free/reduced-price lunch status).⁸ In addition, we include both student ability and prior educational attainment by matching on eighth-grade math, reading and English test scores.⁹

Table 4. Estimates of the Effect of Attending a Charter High School on Educational Attainment

	HIGH SCHOOL DIPLOMA	COLLEGE EVER	COLLEGE PERSISTENCE	COLLEGE DEGREE OR CERTIFICATE
Start-up Charter Ninth Grade	0.0421***	0.0582***	0.0756***	0.0229*
	(0.0148)	(0.0191)	(0.0236)	(0.0125)
Observations	5,072	3,024	1,692	1,692

Robust standard errors in parentheses

*** p<0.01, ** p<0.05, * p<0.1

Source: GA•AWARDS data and author's calculations

Table 4 shows estimates of the relationship between charter high school attendance and the probabilities of earning a standard high school diploma within five years of entering the ninth grade, enrolling in

... those attending a charter high school are 5.8 percentage points more likely to attend a two- or four-year college ... college within seven years, persisting in college, and earning a college degree or certificate. Our results are similar to those found in the recent literature (Booker et al. 2011; Sass et al. 2016), but the effects are generally smaller. We find that charter high school enrollment is positively associated with educational attainment and is statistically significant. The small positive coefficient in Column 1 indicates that attending a charter high school increases the likelihood of graduating from high school by 4.2 percentage points. Column 2 shows that those

⁸ English language skills are measured by participation in an English as a second language program.

⁹ For test scores, we use the student's eighth-grade Georgia CRCT scores in reading, math and English. Note that the CRCT was retired after the 2013-14 school year and was replaced by the Georgia Milestones Assessment System beginning with the 2014-15 school year.

attending a charter high school are 5.8 percentage points more likely to attend a two- or four-year college than the control group.¹⁰

Column 3 shows results for persistence in college. We define persistence as attending college for two or more consecutive academic semesters following initial college entry. The estimated relationship between charter high school attendance and college persistence is positive and statistically significant. Our result

of a 7.6 percentage increase in the likelihood of persistence in college is smaller than that found by Sass et al. (2016), which was a 12-percentage-point greater likelihood for charter high school students.

... students who attend charter high schools are slightly more likely to earn a college degree or certificate.

Finally, Column 4 shows that students who attend charter high schools are slightly more likely to earn a college degree or certificate. The result is positive and statistically significant but only at the 10 percent level. This smaller size and significance of this result compared to our other findings could be either due to fewer available observations to test this effect or a weaker effect of attending a start-up charter in ninth grade.

ROBUSTNESS

While our results are similar to those found in the literature, it is important to test their robustness to various changes in the composition of the treatment and control groups as well as changes in the matching criteria used in the model. The composition of our treatment and control group might insert bias into our estimation results in a few ways. The first concern is that many students in the treatment group come from charter schools that include middle and high school grades. The students do not transition from one middle school to different high school. Thus, it is possible that the effect being measured is partially due to the potential benefit of not having to change schools between eighth and ninth grade. This is a concern found in the literature generally (see Sass et al. (2016)).

To test the potential transition effect, we split our treatment group into two subsamples: those who change schools from eighth to ninth grade (the transition group) and those who did not (the nontransition group). We find that our results generally persist when the model is run on either treatment group with the control group being those students who went to a traditional public school for ninth grade. Table 5 shows our results. For the treatment group (made up of only the transition group), we find positive and statistically significant coefficients for high school graduation of 0.041 and college attendance of 0.072. These effects are similar in size to our results using the full sample but are statistically significant at only the 10 percent level. This decrease in statistical power is likely due to the smaller sample size. The coefficient on college persistence is also positive but not statistically significant. Again, this may be due to a smaller sample size.

¹⁰ A small percentage of students in the relevant cohorts were dual-enrolled high school students. They are not included in the assessment of ever attending college, because they were still in high school.

TREATMENT GROUP	HIGH SCHOOL DIPLOMA	COLLEGE EVER	COLLEGE PERSISTENCE
Transitioning Students	0.0410*	0.0723**	0.0281
	(0.0228)	(0.0304	(0.0389)
Non-Transitioning Students	0.0491***	0.0444*	0.0843***
	(0.0176)	(0.023)	(0.0284)
Treatment Groups Only	0.0312	0.0722*	-0.0126
	(0.0261)	(0.0387)	(0.0534)
Georgia Cyber Academy Excluded	0.0827***	0.116***	0.0938***
	(0.0169)	(0.0214)	(0.0253)

Table 5. Robustness Tests Results

Robust standard errors in parentheses

*** p<0.01, ** p<0.05, * p<0.1

Source: GA•AWARDS data and author's calculations

The results from the treatment sample of nontransition students are again similar to the results from the full sample model in Table 4. The coefficient for high school graduation is 0.049 and statistically significant at the 0.01 percent level. The coefficient on college attendance is 0.044 and statistically significant at 10 percent level, and the coefficient on college persistence 0.084 and statistically significant at the 0.01 percent level. The lower level of statistical significance on the college attendance coefficient is somewhat puzzling given the strong statistical significance of the high school graduation and college persistence coefficients, but it could be related to the smaller sample sizes.

A second concern is that the two groups differ systematically in some unobserved way when compared directly to each other for our outcomes of interest. To test this, we compare the two subsamples to each

other using the transition group as our treatment group and the nontransition group as the control. In this case, both treatment and control students attended eighth and ninth grade at a start-up charter. For high school graduation, we find a positive but not statistically significant coefficient of 0.031 for the transition group compared to the nontransition group. The average treatment effect of 0.072 college attendance coefficient is positive and statistically significant at a low 10 percent level. This suggests that students who change schools from eighth to ninth grade are roughly 7.2 percentage points more likely to attend college than those who did not change schools. The coefficient on college persistence is small and negative but not statistically significant.

This robustness check provides evidence that the two subsamples, within our original treatment group, do not differ for high school graduation or college persistence.

This robustness check provides evidence that the two subsamples, within our original treatment group, do not differ for high school

graduation or college persistence. If our positive findings were being driven by the positive effect of not

transitioning schools from eighth to ninth grade, these two groups would be statistically different from one another for our outcomes of interest. Thus, it is unlikely that the two groups differ systematically in some unobserved way that is influencing our positive findings. This robustness test also indicates that if

... attending a charter high school has a positive effect on high school graduation, college attendance, persistence in college and receiving a college diploma or certificate in Georgia. the results in our preferred specification are being affected by our treatment group not transitioning schools between eighth and ninth grade, the influence is working against our positive findings. While the evidence is weak, the group of students who changed schools were more likely to have positive outcomes compared to those who did not, the opposite of what would be the case if not transitioning were a benefit.

A third concern is that the large student body of the Odyssey School, which includes the Georgia Cyber Academy, could be biasing our main results.¹¹ The school included 1,176 ninth-grade students for the treatment group (those who attended charter school in ninth grade) and 1,741 students for the control group (those who attended public school for ninth grade, see Appendix). To test the effect that Odyssey

might have on our results, we ran the model but excluded all Odyssey students from both the treatment and control groups. Table 5 shows the results. The coefficient for high school graduation is 0.083, the coefficient on college attendance is 0.012, and the coefficient on college persistence is 0.094, all statistically significant at the 0.01 percent level. These coefficients are larger than for the full sample model, suggesting that if the large cyber academy is influencing our results, it is diminishing the strength of the positive effects of attending a start-up charter high school for ninth grade.

As our results show, attending a charter high school has a positive effect on high school graduation, college attendance, persistence in college and receiving a college diploma or certificate in Georgia. Due to data limitations, we were unable to test the effects that attending a charter high school has on wages. As more data become available through GA•AWARDS, we hope to be able to be able to answer that question for Georgia. While we are unable to make a direct connection to charter school student wages at this time due to data limitations, if charter school students in Georgia are more likely to earn a college degree, one can reasonably conclude that they are more likely to earn higher wages than their peers who attended traditional public schools.

Other types of studies have found a correlation between improved academic outcomes and earnings in the workforce. It is important to note that these studies produce simple bi-variate correlations and thus do not control for other factors. According to the U.S. Bureau of Labor Statics (BLS), high school graduates

¹¹ Until July 1, 2014, the Odyssey School was in a partnership with K12, Inc. to operate the Georgia Cyber Academy (GCA). As of the 2014-15 school year, the bricks-and-mortar Odyssey School served about 400 students in grades K-8, while GCA served roughly 13,000 students across Georgia. Over the years, this arrangement between Odyssey and GCA has made it difficult for the Georgia Department of Education to track the students in either school. However, because our study focuses on attending a charter high school, this is less of a problem as Odyssey does not serve high school students.

report lower unemployment rates and have higher median earnings than those without a high school degree. The national median weekly earnings for workers with a high school diploma were \$668 in 2014 compared to \$488 for those with less than a high school diploma. College-educated workers had higher wages still, with the size of the difference depending on the degree earned. For those with a bachelor's degree, the national median weekly wage in 2014 was \$1,101 compared to \$761 for those with an associate's degree. Note that these results do not consider other factors that might affect earnings, such as ability, age, gender, race/ethnicity and health. (For a more thorough discussion of this topic, see Bluestone et al. (2016).)

Several other benefits can be linked to reaching various academic milestones. Higher incomes result in lower spending on social assistance, which could benefit state and local governments. For instance, in 2012, the BLS estimated that nationally, benefits received by individuals in income groups that are comparable to the earnings of workers without a high school degree averaged \$1,040 per year. Public assistance for higher wage earners averaged \$385 per year in 2012.¹²

Another benefit of higher graduation rates is lower incarceration rates (Dobbie and Fryer 2013). According to the Georgia Department of Corrections, the annual average cost per inmate totaled roughly \$20,000 in 2015. Again, this is a benefit that would accrue mostly to state and local governments. Lower rates of incarceration would suggest that fewer crimes are being committed. Lower crime rates would benefit communities. These benefits are harder to quantify but can be substantial. For instance, Heckman et al. (2010) estimates that the benefits to society from the reduction in crime associated with successful early childhood interventions for disadvantaged urban children account for 41 to 66 percent of the program benefits when expressed as an annual rate of return.¹³ (For a thorough discussion of the difficulties in estimating these benefits see, Heckman et al. 2010.)

Conclusion

This report, the third in a series on the economic impact of start-up charter schools in Georgia, provides further evidence that start-up charter schools are having a positive economic impact on the students who attend them and their communities. We find that attending a Georgia charter high school increases the likelihood of high school graduation by roughly 4 percentage points, and such students are 6 percentage points more likely to enroll in college than comparison groups of students who attended charter middle schools but then went to traditional public high schools. Once in college, charter high school students are about 8 percentage points more likely to persist for two consecutive semesters and 2 percentage points more likely to earn a college degree or certificate than the students who attended traditional public high schools.

¹² These benefits included public assistance, supplemental security income and food stamps, which are predominantly federal programs.

¹³ This variation is due to assumptions made in the value of statistical life due to declines in the murder rate.

These results provide evidence that charter schools improve academic outcomes later in life. The increased likelihood of college graduation and earning a degree or certificate suggests that charter high schools are imparting some additional skills to students, rather than just successfully coaching them to high school graduation and then helping them enroll in college.

These results lead to additional questions for research. As was discussed earlier, charter schools in Georgia have shown mixed results in improving students' test scores (Sass 2015). Some scholars attempting to identify the skills and qualities imparted to students by charter high schools claim that such schools can teach hard-to-measure qualities such as grit, persistence, self-control and conscientiousness. While these skills are not fully captured in test scores, they are important in achieving long-term outcomes. (See, for instance, Duckworth and Allred (2012).) These results provide evidence that charter schools improve academic outcomes later in life. The increased likelihood of college graduation and earning a degree or certificate suggests that charter high schools are imparting some additional skills to students, rather than just successfully coaching them to high school graduation and then helping them enroll in college.

Additional research is needed to determine how and why Georgia start-up charter schools are improving life outcomes for their students. Bluestone et al. (2016) categorized the educational pedagogy of 50 Georgia start-up charter schools to identify those that use No Excuses methods. Building on this work, using future GA•AWARDS data would allow us to test the effects of attending a No Excuses charter school on achievement and later life outcomes. Additionally, the inclusion of several future cohort years of GA•AWARDS data also would allow us to directly test the effects of charter high school on wages.

Another potential extension of this research would be to identify the effects of attending charter schools on students who leave high school but do not enter the labor force. Merging data available to the Center for State and Local Finance on recipients of the Temporary Assistance for Needy Families (TANF) program and the Supplemental Nutrition Assistance Program (SNAP) would allow researchers to better understand how charter school attendance effects participation in these federal programs.

This research joins a small group of studies that look at broader outcomes such as graduation rates and adds Georgia charter schools to a list of studied localities that previously included only Chicago, New York, Boston and Florida. Our findings are significant as there is an earnings premium associated with reaching the various milestones we assess. For instance, BLS estimates that high school graduates earn almost \$200 more per week than non-graduates and college graduates earn \$433 more per week than those with only high school diplomas. These additional earnings provide an economic impact to the communities in which they are spent. In addition, increased wages associated with high school graduation

and college enrollment can be linked to lower social programs as well as lower rates of incarceration, which can benefit state and local governments. As this report, as well as the previous reports demonstrate, start-up charter schools do have meaningful economic impacts on the individuals that attend them as well as their communities in Georgia.

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		9TH GRAD	OLLMENT	
SOURCE SCHOOL	8TH GRADE ENROLLMENT	NON-START-UP CHARTER	START-UP CHARTER	SAME SCHOOL AS 8TH GRADE
Amana Academy School	121	58	63	0
Atlanta Charter Middle School	224	196	28	0
Baconton Community Charter School	582	52	265	265
Brighten Academy	183	182	1	0
CCAT School	230	45	93	92
Challenge Charter Academy	126	68	32	26
Charles R. Drew Charter School	512	466	46	0
DeKalb Academy of Tech	155	154	1	0
DeKalb Path Academy	354	351	3	0
Elite Scholars Academy School	411	66	173	172
Fulton Science Academy	877	650	114	113
Fulton Science Academy High School	0	N/A	197	0
Georgia Connections Academy	173	71	57	45
Hapeville Charter Career Academy	0	N/A	207	0
Hapeville Charter Middle School	1,092	656	319	117
Imagine International	210	207	3	0
Imagine Wesley	66	61	5	0
International Academy	122	120	2	0
Ivy Preparatory Academy School	140	127	13	0
KidsPeace	71	36	18	17
KIPP Atlanta Collegiate	0	N/A	141	0
KIPP South Fulton	285	212	73	0
KIPP West Atlanta	347	215	132	0
Lanier Career Academy	267	144	64	59
Odyssey School/GA Cyber Academy	3,999	1,741	1,176	1,082
Oglethorpe Charter	722	720	2	0
Tech High School	0	N/A	106	0
University Charter	279	247	32	0

Appendix. Selected Charter Schools with Enrollment by Source School

Source: GA•AWARDS data and author's calculations

About the Authors

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About the Center for State and Local Finance

The Center for State and Local Finance's (CSLF) mission is to develop the people and ideas for next generation public finance by bringing together the Andrew Young School's nationally-ranked faculty and the broader public finance community. CSLF conducts innovative, nonpartisan research on tax policy and reform, budget and financial management, education finance, and economic development and urban policy. Additionally, it provides premier executive education in public finance for state and local finance officials and works with local and state partners on technical assistance projects on fiscal and economic policy.

CSLF maintains a position of neutrality on public policy issues. However, in order to protect their academic freedom, authors may express a wide range of viewpoints in CSLF's publications. The research, interpretations or conclusions in CSLF publications should be understood to be solely those of the author(s).

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About the State Charter Schools Commission of Georgia

The State Charter Schools Commission of Georgia is a state-level, independent charter school authorizing entity. The commission has the power to approve or deny petitions for commission charter schools and renew, nonrenew, or terminate commission charter school petitions in accordance with Georgia law.

While the Commission's duties are set forth in law and extend beyond simply authorizing schools, the Commission's principal obligations include:

- Reviewing charter school petitions for commission charter schools and assisting in the establishment of commission charter schools throughout Georgia;
- Developing and promoting best practices for charter schools and charter school cosponsors to ensure that high-quality charter schools are developed and encouraged;
- Promoting high standards of accountability for commission charter schools; and
- Monitoring and annually reviewing the academic and financial performance, including revenues and expenditures, of commission charter schools and holding the schools accountable for their performance pursuant to the charter.

FERUARY 17, 2022

THE CENTER FOR STATE AND LOCAL FINANCE

The Effects of Start-Up Charter Schools on Earnings and Academic Milestones

Peter Bluestone Nicholas Warner





ANDREW YOUNG SCHOOL CENTER FOR STATE & LOCAL FINANCE

About the Report

This report follows a three-part series requested by the State Charter Schools Commission in 2016 and performed by the Center for State and Local Finance that analyzed the economic impact of start-up charter schools. That series of studies focused on the economic impact start-up charter schools have on the individuals who attend them, the communities they serve, and the state of Georgia as a whole.

One primary finding missing from those earlier studies were estimates of the impact that start-up charter schools might have on later-life earnings. Data limitations prevented such estimates at the time, but newly available data make these estimates possible. This report updates the previous work by estimating the effect Georgia's start-up charter schools have on students' later-life earnings.

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Introduction

Since the first charter school opened in 1992, 42 states and the District of Columbia have adopted provisions allowing charter schools to operate (Epple et al., 2015). Advocating reform to struggling public education systems, the proponents of charter schools envisioned that these schools' autonomy would lead to innovation and improved educational outcomes for students. Proponents also hoped that the increased competition for students would spur improvements in traditional public schools (TPS). Improved academic

performance in both settings is important, as research has found that it leads to better economic outcomes for both individuals and communities (Hanushek & Kimko, 2000; Card, 1999).

The effect of charter school attendance on students' academic achievement and life outcomes has been long debated and extensively researched; research on whether charter schools improve student achievement has been conducted in at least 27 states (Cremata et al., 2013). Typically, researchers have used changes in test scores, specifically among students in elementary and middle schools, to measure student achievement. This extensive research on the effectiveness of charter schools has yielded mixed results (see Bluestone, 2016, for a review of the The effect of charter school attendance on students' academic achievement and life outcomes has been long debated and extensively researched.

literature). Less is known about the impact these schools have on other metrics of student success in either high school or college.

This report examines the impact of Georgia's start-up charter schools on students' later-life earnings as well as updates previous findings on academic milestones—high school graduation, college enrollment, and degree completion. We use data from Georgia's Academic and Workforce Analysis and Research Data System (GA•AWARDS), housed by the Governor's Office of Student Achievement, for this report. This longitudinal data system starts collecting data on Georgia public school students upon their entrance to Georgia's Pre-K Program, if they participate, all the way through their roles in Georgia's labor market.

We utilize an average treatment effects model to isolate the differences in critical educational outcomes between students who were enrolled in start-up charter high schools and a group of matched students who attended traditional public high schools. All the students studied attended a charter middle school; this sample restriction controls for selection effects, which would otherwise bias the results.

The report is organized as follows: The types of charter schools in Georgia are briefly reviewed. Then, the third section discusses the economic theory on the link between academic achievement and economic impact. The fourth section summarizes the measures used in the literature to assess charter school success. The fifth section examines data and research methods. The sixth section reviews summary statistics, and the seventh section describes model specification, results, and robustness checks. The concluding section suggests areas for future research.

Charter Schools in Georgia

While charter schools are public schools, they can differ from TPS in many ways, including but not limited to the length of the school day, mandatory summer school, and the instructional methods offered. However, there are two key factors that significantly differentiate them from TPS. First, rather than children being assigned to a specific public school, parents can choose whether to send their children to a charter school. Second, charter schools have increased flexibility in how they educate students in exchange for increased accountability. The flexibility pertains to both state and district regulations that govern operations as well as the nature of the educational programs provided.

Per the 2020-21 *Georgia Charter Schools Annual Report,* 116 charter schools were operating in Georgia at the start of the 2020-21 school year. This total includes state charter schools but not those in charter system districts. These schools may be divided into three broad types (Georgia Department of Education 2020 Types of Charters):

- **Start-Up Charter School:** A new school created by a petition made by a nonprofit governing board. Start-up charter schools may determine their own attendance zones, including priority attendance zones.
- **Conversion Charter School:** A charter school that existed as a local public school prior to becoming a charter school. Entrance into conversion charter schools is usually guaranteed for students residing within the school attendance boundaries as determined by the local school board.
- Charter System School: A charter system is a local school district that operates under a charter between the school district as the charter petitioner and the State Board of Education. Schools in a charter system are different from conversion and start-up charter schools. The school district, not the school and school governing board, has the contract with the state. Thus, schools in charter systems are generally more similar to a traditional public school and operate in a comparable manner. For instance, the Atlanta Public School district is now a charter system.

At the start of the 2020-21 school year, students enrolled in charter schools (not including charter systems) represented 4.9% of all K–12 public school students in Georgia. There are considerably more schools in charter systems and thus more students. Due to the similarities conversion charter schools and charter systems have with TPS, we restrict our analysis to start-up charter schools in this report.

The Economic Theory of Academic Achievement and Economic Impact

This report relies on the theory that academic achievement leads to improved job outcomes, which make a positive economic impact on the community. Economic theory has long held that increased business investment in new machines and equipment (capital investment) fosters economic growth. In 1962, economist Gary Becker expanded the concept of capital investment to include schooling and training. Economic theory holds that better-educated workers are more productive, which can lead to both economic

growth, thereby improving the larger economy, and higher wages, an economic benefit to individuals. Spending on schooling and training is now commonly referred to as investing in human capital.

Since Becker published his article, the literature on human capital has grown dramatically and fits into two broad categories: the macroeconomic effects of education on countries' growth rates and the higher earnings associated with individuals' investment in education. While both areas of research have been fraught with debates about appropriate research methods, there is consensus on two broad outcomes. First, in the macroeconomic setting, better schooling, measured by cognitive development in a country, is related to greater economic growth (Hanushek & Kimko, 2000; Hanushek & Woessmann, 2012). Second, from the perspective of individuals, higher educational attainment leads to substantially higher lifetime earnings (Card, 1999; Heckman et al., 2006). This report focuses on the second category, primarily on educational attainment.

Charter Schools: Measures of Success Used in the Literature

This section explores the empirical literature on charter schools' effects on academic achievement, graduation rates, wages, and other life outcomes. The discussion is relatively brief and limited to high-quality studies that use methods relevant to this report. (For a thorough discussion of this literature, see Bluestone et al., 2016.)

For charter schools to have a measurable economic impact, they need to improve outcomes for students later in life. Charter schools that increase the percentage of students who graduate from high school, attend college, obtain degrees, and earn higher salaries will have positive economic impacts on their communities. A recent stream of the literature examines the potential effects that charter schools have on these outcomes. Additionally, many studies explore the role that charter schools play in academic achievement, which we outline first.

The literature on how charter schools affect student achievement is contentious.

ACADEMIC ACHIEVEMENT

An extensive body of work explores the effects that charter schools have on academic achievement, as measured by performance on standardized tests. This rich literature has measured charter school effects on academic performance at the elementary and middle school levels. Many of these studies rely on a lottery research design.

The literature on how charter schools affect student achievement is contentious. Many of the studies using the lottery method provide strong evidence that certain charter schools can improve student achievement. Because students and their parents choose to enroll in charter schools, any study that compares charter students to traditional high school students has an inherent selection bias issue. Consequently, many studies

that attempt to pinpoint the impacts of charter school attendance rely on a lottery research design, which takes advantage of the random selection that an attendance lottery provides in oversubscribed charter schools. Researchers compare the performance of students chosen for the charter school to that of students not chosen (and who consequently attend a traditional public school). When schools that operate in varying contexts and areas are studied together, even when using the lottery method as Gleason et al. (2010) did, the effects on average tend to be small or zero. Research shows that this low average effect is due to the variability in effects across schools. More recent studies that have tried to uncover the source of this variation suggest that charter schools which serve disadvantaged students—typically ones in urban settings that focus on strict discipline, tutoring, and longer school days (often referred to as the No Excuses model in the literature)—do improve student achievement. Other types of charter schools have not been found to outperform TPS in any consistently measurable way.

Student achievement has been firmly linked to better life outcomes such as increased high school graduation rates and higher wages; consequently, the effects found in the literature described above are a reasonable predictor of better economic outcomes for students later in life. (For instance, see Angrist et al., 2016; Sass et al., 2016; and Dobbie & Fryer, 2013.)

OTHER OUTCOMES

Studies testing the effect of attending charter high schools on outcomes that directly relate to economic impacts such as graduation rates, higher education milestones, and wages have been published since 2010. This makes sense because the first classes of charter school students have only recently begun graduating from high school, so there are limited numbers of charter school alumni for which these outcomes can be measured. Also, the data must be available for recent years to capture both attendance at charter schools and observable outcomes post—high school graduation. While the literature is not well established, most of the studies that have been able to track students into the workforce find positive effects from enrollment in a charter school on graduation rates, education outcomes, and wages.

Some studies have found that enrollment in charter high schools increases the chances of high school graduation and college attendance (Booker et al., 2010; Clark et al., 2015). Unlike test scores, high school graduation and earnings immediately after graduation are onetime events; any study of charter schools' effects on these outcomes cannot rely on multiple observations for a student over time to help control for potential charter school selection bias, inherent when families chose whether to attend a charter school. To account for such bias, Booker et al. (2010) considered only students who had previously attended a charter middle school.¹ In a follow-up study, similarly designed except with a matching protocol implemented to further correct for any charter selection bias, the authors found similar results for high school graduation and college attendance. In addition, they found that charter enrollment predicted longer college persistence and higher earnings (Sass et al., 2016).

¹ Middle school enrollment grades can vary between school districts. For the purposes of this report, middle school includes grades 6 through 8.

It is worth noting that not all studies have found a positive effect of charter schools on student outcomes. A recent study on Texas charter schools found that at the mean, charter schools have no impact on test scores and a negative impact on earnings. For some types of charter schools, the No Excuses charters, the results were more in line with the existing literature, finding an increase in test scores and four-year college enrollment. But, again, there was no statistically significant impact on earnings (Dobbie & Fryer, 2020). Due to the structure of Texas charter schools as well as data limitations, the authors used a cohort-fixed-effects approach to ensure their results were causal. This approach, while necessary given the circumstances, differs in important statistical ways from that used by Sass et al. (2016).

Two lottery-style studies conducted on oversubscribed charter schools in Boston and Harlem found positive effects of charter enrollment on some noncognitive outcomes (Angrist et al., 2016; Dobbie & Fryer, 2013). Charter schools were found to increase the chances that a student would enroll in a four-year rather than two-year college, but the researchers found no evidence that the charter schools increased the likelihood of high school graduation (Angrist et al., 2016). The students who attended Harlem's charter schools were more likely to enroll in college, girls were less likely to become pregnant as teens, and male students were much less likely to be incarcerated than students who participated in the lottery but attended Harlem's TPS (Dobbie & Fryer, 2013).

The few studies that look at broader outcomes such as graduation rates and earnings are recent and focus only on schools in Chicago, New York, Boston, and Florida (e.g., Angrist et al., 2016; Dobbie & Fryer, 2013; Sass et al., 2016). However, these studies might provide the best evidence that charter schools are having positive economic impacts on communities and individuals through improved academic achievement.

Data and Research Methods

This analysis attempts to establish a causal relationship between ninth-grade attendance at a start-up charter school in Georgia and higher earnings in the job market. We rely on the GA•AWARDS data set. These data, first established through the Race to the Top statewide longitudinal data system grant, are generated by many state education and workforce agencies and university systems. The data, which are housed and maintained by the Governor's Office of Student Achievement, include information on Georgia's students from enrollment in pre-K through their entrance into the labor market for the years 2007–20. The student-level data set contains information on students' test performance, demographics, teachers, graduation outcomes, college and technical school enrollment, postsecondary degree attainment, and any employment records.²

The data follow Georgia students throughout the full calendar years of 2007–19. Many start-up charter schools serve only elementary and middle school–aged students, so the data system currently contains limited labor market outcomes for these students. Our analysis centers on the students the data allow us to

² College enrollment includes out-of-state colleges and universities.

follow, from a start-up charter school through high school graduation and beyond, to measure the effects that start-up charter schools have on these outcomes.

Isolating a causal relationship between attending a charter school and later life outcomes requires methods that account for the potential selection (empirical) bias from more interested students and families selecting into charter schools. To do so, we estimate average treatment effects within matched ninth-grade students attending start-up charter high schools (treatment) and TPS or conversion charter high schools (control)—all of whom attended a start-up charter school for eighth grade. This method, frequently used in the literature, reduces the likelihood that neither selection into a charter school nor student population differences are

influencing the findings. Our control group, therefore, is students who attended eighth grade at a charter middle school and then attended a traditional public high school; our treatment group consists of students who attended a charter middle school and continued into a start-up charter high school. This model assumes equal geographic access to charter ninth grade across the charter eighth graders studied, an assumption we examine in depth in the appendix.

Individual charter schools differ in the legal framework under which they operate, complicating our analysis. Each school has its own curricular focus, instructional style, and teachers. The schools follow different schedules and serve different communities. Because of Individual charter schools differ in the legal framework under which they operate, complicating our analysis.

these variations, much of the research on charter schools has been specific to a school or small set of schools within a given state, making it difficult to generalize the findings to other charter schools.

All the differences across charter schools create methodological complications when attempting to evaluate the performance of an individual school. Comparing the outcomes of students who attended a charter school to those who attended a traditional public school suffers from potential sample selection bias. By choosing to enroll, or attempting to enroll, in a charter school, a family and student are indicating intrinsic motivation and a potentially higher value placed on education than families and students who do not attempt to enroll. Any effect found in a study that does not correct for this possible selection bias could just be capturing the effect of the higher levels of motivation and value placed on education rather than the charter school's impact on the student. (For a full review of the literature on the effect of charter schools on student achievement and other life outcomes, see Bluestone et al., 2016.)

The extant research on charter schools has used multiple methods to account for this potential selection bias. The chosen method varies depending on the outcome being measured and the type of data available.³ Ideally, researchers would be able to select students and randomly assign them to a charter school or a

³ An excellent survey of the academic literature on charter schools and the various statistical methods used to correct for selection bias was recently conducted by Epple et al. (2015). They identified five methods used to correct for this potential bias: 1) fixed effect approaches, 2) a random lottery design, 3) matching procedures, 4) an ordinary least squares regression design, and 5) instrumental variable approaches.

traditional public school and then observe the differences in outcomes. However, that is not possible. The next best real-world alternative is referred to as a lottery-style research design. This research design takes advantage of the random selection that an attendance lottery provides in oversubscribed charter schools. Researchers can address selection bias by comparing the performance of students chosen for the charter school to that of students not chosen (and who consequently attend a traditional public school). Thus, the comparisons of student outcomes take place only among individuals who wanted to attend that school, and as both groups are presumably similarly motivated, any difference can be attributed to the effect of attending the charter school. Lottery-style studies are not always practical, particularly if the schools of interest are not oversubscribed or lottery results are not available, as is the case for our study.⁴

Another approach to addressing selection bias is to use longitudinal pretreatment measures, usually test scores, when examining academic achievement. As students take tests repeatedly over many years, the change in test scores for individual students who move between TPS and charters can be used to infer the impact of charter school attendance on student achievement. As individual student outcomes are observed, important student and family characteristics are controlled for. The validity of this method has recently been demonstrated by Furgeson et al. (2012) and Tuttle et al. (2013). This approach is also not possible for our study because we focus on long-term outcomes such as high school graduation, which are onetime events after charter school enrollment.

Researchers have been confronted with these empirical limitations before and have devised a method to deal with them. To create a comparison group, they rely on students who attended a charter school in the eighth grade. The expectation is that this group of students will be similar in terms of unobserved family and student characteristics that would also be present in those who enroll in charter high schools (Booker et al., 2010; Sass et al., 2016).⁵

The treatment students in this type of analysis remain enrolled in charter schools in ninth grade, whereas the control students attend TPS for high school. This type of analysis also addresses selection bias by controlling for baseline student demographics and measures of ability, including eighth-grade test scores. Finally, a matching protocol is used to further control for unobserved characteristics and selection bias. A one-to-one nearest-neighbor covariate matching approach is used in which students in the treatment group are matched based on observable characteristics with a student who attended a traditional public high school in ninth grade.

This matched average treatment effects model is similar to that used in other studies (Booker et al., 2010; Sass et al., 2016). In our analysis, the students who attended a start-up charter in eighth grade represent the group of potentially studied students. The students who also attended a start-up charter in ninth grade are the treatment group, and the students who remain (attending a traditional public high school or conversion

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⁴Additionally, oversubscribed schools often are the top-performing schools, so results may not be applicable to all schools.

⁵ Dobbie and Fryer (2020) did not have the ability to control for charter middle school attendance and instead used a cohort-fixedeffects approach to ensure their results were causal based on fourth-grade scores and type of school attended. We can replicate the Sass et al. (2016) approach and thus leave the more restrictive method used by Dobbie and Fryer for future research.

charter school) are the potential matched control group. Any effect found is between students and families who were all interested in and attended a charter school. The matching process ensures that the groups of students compared are similar in all possible ways except for charter high school attendance. We also perform several robustness checks to test the importance of the student-level matching criteria.⁶

Summary Statistics

GA•AWARDS provides comprehensive data on all students enrolled in Georgia's public education system as well as their later transition into the workforce. This data set includes where individual students attended eighth and ninth grade and their workforce information years later. Table 1 shows the relevant number of eighth-grade cohorts by type of school based on information in the GA•AWARDS data set. The table also includes the date each cohort reached various academic milestones, such as high school graduation. There has been considerable growth in the size of start-up charter school eighth-grade cohorts from school year 2006-07 to 2010-12. In 2006-07, there were 835 eighth-grade students in start-up charter schools including state commissioned and virtual charter schools; by 2010-12, there were 2,084.

Table 1

	EIGHTH-GRADE COHORTS*			ON-TIME ED		INMENT
SCHOOL YEAR	CONVERSION CHARTER	START-UP CHARTER	TRADITIONAL PUBLIC SCHOOL	HIGH SCHOOL GRADUATION CLASS	BACHELOR'S DEGREE- SPRING	SCHOOL- YEAR WAGES**
2006-07	1,892	835	129,270	2011	2015	2016
2007-08	1,758	1,337	126,528	2012	2016	2017
2008-09	1,782	1,473	125,321	2013	2017	2018
2009-10	1,898	2,425	126,395	2014	2018	2019
2010-11	1,861	2,084	125,383	2015	2019	2020

Student Enrollment and Milestone Attainment Dates

Source: GA•AWARDS data.

* Non-duplicated student count of eighth-grade students.

** If an eighth grader completed high school and a bachelor's degree, both within four years, they could start working with a fouryear degree the summer of this year.

For this study, we are first interested in the eighth graders who attended start-up charter schools. As the GA•AWARDS data set starts with the full calendar year 2007 and ends with calendar year 2020, it contains a limited number of observations for those eighth-grade cohorts that graduate college and enter the workforce.

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⁶ The small number of start-up charter high schools has been an issue in previous research. However, due to the Georgia Cyber Academy, students who do not have a bricks-and-mortar charter high school close by now have the option of attending a charter high school. The effects of including the Georgia Cyber Academy in our study as a start-up charter school are discussed later in the report.

Table 2 shows the number of eighth-grade students in the treatment and control group cohorts. The treatment group cohorts are composed of students who were enrolled in a start-up charter school in both eighth and ninth grades. The control group is made up of students who were enrolled in a start-up charter school in eighth grade and in a TPS for ninth grade. The table tracks the cohorts as they reach various academic milestones.

Table 2

	TOTAL	TOTAL COUNT		WAGES***
EIGHTH-GRADE COHORT	CONTROL*	TREATMENT**	CONTROL*	TREATMENT**
2007	749	168	460	105
2008	1,222	147	595	102
2009	1,576	224	806	159
2010	1,209	280	762	185
2011	1,307	399	913	304

Treatment and Control Cohorts

Source: GA•AWARDS data.

* Control are potential control students who attended eighth-grade start-up charter schools. Eighth-grade treatment and control cohorts do not equal eighth-grade cohorts in Table 1 due to missing test scores or other data that do not allow for matching.

** Treatment are eighth-grade start-up charter school students who go on to attend a start-up charter high school for ninth grade.
 *** Wages for that student included indicating Georgia employment.

Table 2 shows that in both the treatment and control groups, sizeable shares of students are not observed working in Georgia nine years after eighth grade. This could be due to either a lack of employment in Georgia or these students having left the state. For instance, of the 749 students in the 2007 control cohort, only 460 of them were working in Georgia in 2016 (61%), and 105 of the 168 start-up charter ninth-grade students were working in Georgia in 2016 (63%).

Table 3 shows the mean value for the various academic achievement and demographic characteristics of the treatment and control groups, after matching. The standardized mean difference indicates that we have good balance in our matches. The last column in the table shows the standardized mean difference before matching.⁷ This column shows the difference in the treatment population compared to all potential control candidates. Recall that control students are those that attended a start-up charter school for eighth grade but went on to a TPS high school for ninth grade. We briefly discuss these differences to illustrate the importance of the matching protocol to minimize bias as well as to highlight potential systemic differences between the treatment and control populations that require additional levels of inquiry.

⁷ Standardized mean differences are the difference between two observed averages after accounting for the variance in the underlying data used to compute the averages.

Table 3

	TREATMENT A MEANS–AFTE		• • • • • • • • • • • • • • • • • • • •	ED PERCENT IN MEANS**
EIGHTH-GRADE MEANS	TREATMENT COHORT	CONTROL COHORT	AFTER MATCHING	BEFORE MATCHING
English Score*	0.63	0.60	0.04%	0.13%
Math Score*	0.60	0.56	0.04%	0.14%
Reading Score*	0.62	0.60	0.02%	0.08%
Free Lunch	0.63%	0.64%	-1.7%	-13.0%
Gifted	11.9%	11.9%	0.00%	0.00%
Limited English Proficient	0.97%	0.97%	0.0%	-1.3%
Black	56.5%	56.2%	0.7%	-21.3%
Female	55.4%	56.0%	-1.3%	0.0%

Summary Statistics for Treatment and Control Cohorts*

Source: GA•AWARDS data and authors' calculations.

* Test scores have been normalized within year and test relative to a distribution with a mean zero and standard deviation of 1. The grade test score was used when available. If an eighth-grade score was missing, the last test score before ninth grade was used.

** Standardized percent difference takes into account the standard deviation of the means.

First, we examine the academic achievement measures before matching. The pool of potential control students on average scored 0.1 standard deviations lower than the treatment students on the Georgia math Criterion-Referenced Competency Test (CRCT). Second, we examine income and race. On average, the treatment group appears to have lower family incomes than the potential control group, with 13% more treatment students receiving free or reduced-price lunch than the potential control group. We note that the treatment group has a lower share of black students than the potential control group. For these demographic and achievement metrics, there does not seem to be any systematic pattern that would cause problems for the matching protocol.

Model Specification and Results

In this section, we describe our modeling specification. As discussed earlier, our treatment group consists of students who attended a charter middle school for eighth grade and then a charter high school for ninth grade. The control group attended a charter middle school for eighth grade and then a traditional public high school for ninth grade. Note that our classification is determined only by ninth grade high school attendance and is not affected by whether the student continues on at the charter school for grades 10–12. This choice was made to avoid problems of selection bias associated with students transferring out of the treatment group. Thus, the estimates of charter high school effects are similar to "intent to treat" impact estimates, where treatment is completing high school at a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade in a start-up charter high school (by entering ninth grade high school (by entering ninth grade high grade high school (by ente

To further control for endogeneity, we follow a matching approach used in previous studies (Booker et al., 2011; Sass et al., 2016). We use a one-to-one nearest-neighbor covariate match in which observable characteristics from the treatment group (start-up charter ninth-grade enrollment) are matched with students attending traditional public high schools to create a control group.⁸ We then examine the difference in student outcomes between those in treatment relative to this counterfactual control group.

The causal nature of our treatment relies on an important assertion. The statistical process estimates the difference in the mean value of the outcome of interest for the treatment and control groups, for instance, the likelihood of high school graduation. For the treatment to have a causal relationship to any observed difference, the observable characteristics must be sufficient to make the counterfactual outcome—choosing to attend a traditional public high school—independent of the milestone of interest. To satisfy this condition, we chose only students who had enrolled in a charter school for eighth grade. Put another way, the model can be deemed causal only if upon leaving the charter school after eighth grade, a student's chance of graduating from high school is independent of their choice to attend a traditional public school, controlling for the observable characteristics using the matching process. For a technical discussion of these criteria, see Smith and Todd (2001). We later conduct a sensitivity analysis using modifications to both the treatment and control groups for the matching analysis approach to provide further evidence of the robustness of our results.

RESULTS

The previously published Report 3, *The Effects of Start-Up Charter Schools on Academic Milestones*, found that start-up charter high school attendance improved various educational achievement milestones using 2007–2016 data, but data on earnings were not available (Bluestone et al., 2018). The primary purpose of this report is to estimate the effects of start-up charter high school enrollment on future earnings. Table 4 represents updates on those previous findings; it presents the estimated impacts of charter high schools on students' subsequent achievement of three academic milestones: high school graduation, college entry, and college persistence. For the analysis, we match on student demographics, inclusion in the English as a second language (ESOL) program, special education program participation, and family income (proxied by free/reduced-price lunch status).⁹ In addition, we include both student ability and prior educational attainment by matching on eighth-grade math, reading, and English test scores.¹⁰

Table 4, below, shows estimates of the relationship between charter high school attendance and the probabilities of earning a standard high school diploma within five years of entering ninth grade, enrolling in college within seven years, and earning a college degree or certificate. Our results are similar to those found in the recent literature (Booker et al., 2011; Sass et al., 2016), as well as in our prior report. We find that

⁸ This matching protocol is implemented in Stata using the *teffects nnmatch* routine. Robust standard errors are used as recommended by Abadie and Imbens (2006) for this type of matching protocol.

⁹ English language skills are measured by participation in an ESOL program.

¹⁰ For test scores, we used the student's eighth-grade Georgia CRCT scores in reading, math, and English. Note that the CRCT was retired after the 2013–14 school year and replaced by the Georgia Milestones Assessment System beginning with the 2014–15 school year.

charter high school enrollment is positively associated with educational attainment and is statistically significant. Adding three further cohorts of charter eighth and ninth grade students to the previous data boosted the size of the effects slightly. Charter ninth grade students are found to be 7 percentage points more likely to gradate high school on time, 9 percentage points more likely to attend college, and 6 percentage points more likely to receive a college degree or certificate. This compares to our prior findings of charter high school attendance increasing the likelihood of graduating from high school by 4 percentage points, college attendance by 6 percentage points, and college degree or certificate attainment by 2 percentage points.

Table 4

	HIGH SCHOOL DIPLOMA	COLLEGE ATTENDANCE	COLLEGE DEGREE OR CERTIFICATE
Start-Up Charter Ninth Grade	0.0700***	0.0889***	0.0602***
	(0.0184)	(0.0208)	(0.0175)
Observations	2,420	2,420	2,420

Estimates of Effect of Attending Charter High School on Educational Attainment

Source: GA•AWARDS data and authors' calculations.

Robust standard errors in parentheses; *** p<0.01, ** p<0.05, * p<0.1

Table 5 presents the estimated impacts of charter high schools on students' subsequent wages. In this analysis, we wanted to control for observable characteristics that could influence wages as we did with the milestone estimates. The characteristics are the same as those in the milestone analysis and include student demographics, inclusion in the ESOL program, special education program participation, and family income (proxied by free/reduced-price lunch status). Prior educational attainment is also controlled for by matching on eighth-grade math, reading, and English test scores. The results show that students who attend a charter high school in Georgia are estimated to earn \$536 more per quarter than the matched control students. Quarterly wages are used, as that is what is reported by the Georgia Department of Labor's unemployment insurance program. This result was found to be statistically significantly different from zero at the 90% level (see Table 5).

Table 5

Estimates of the Effect of Earnings

	QUARTERLY WAGES
Start-Up Charter Ninth Grade	536.5*
	(275.5)
Observations	1,232

Source: GA•AWARDS data and authors' calculations.

Robust standard errors in parentheses; * p<0.1

A potential critique of our model is its assumption that access to charter high school is not correlated with any of our other variables of interest. However, if geographic access to charter ninth grade restricts certain cohorts of eighth graders from charter ninth grade in a non-random way, our findings could be over or underestimating the effect start-up charter schools are having on later-life outcomes. We construct an alternate model specification which relaxes the restriction that both treatment and control students attended charter eighth grade. This change allows us to investigate the possibility that our results may be influenced by non-random geographic access to charter ninth grade. We find similar results in that attending charter high school has a positive and statically significant result on earnings. For a thorough discussion of this analysis, please see the appendix.

Conclusion

This report, updating *The Effects of Start-Up Charter Schools on Academic Milestones*, the third in a series on the economic impact of start-up charter schools in Georgia, provides further evidence that start-up charter schools are having a positive economic impact on the students who attend them and their communities. We find that attending a Georgia charter high school increases quarterly earnings by roughly \$530. Previous findings of improved educational milestones and attainment are also supported.

These results provide evidence that charter schools improve academic outcomes later in life. The increased likelihood of college graduation and degree or certificate attainment suggests that charter high schools are imparting some additional skills to students, rather than just successfully coaching them to high school graduation and then helping them enroll in college.

Additional research is needed to determine how and why Georgia start-up charter schools are improving life outcomes for their students. Bluestone et al. (2016) categorized the educational pedagogy of 50 Georgia start-up charter schools to identify those that use No Excuses methods. Building on this work using future GA•AWARDs data would allow us to test the effects of attending a No Excuses charter school on achievement and later-life outcomes. The inclusion of several future cohort years of GA•AWARDs data also would allow us to test the effects of charter high school on wages.

This research joins a small group of studies that look at broader outcomes such as graduation rates and adds Georgia charter schools to a list of studied localities that included only Chicago, New York, Boston, and Florida. Our findings are significant, as there is an earnings premium associated with reaching the various milestones we assessed.

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Appendix: Start-Up Charter's Effect on Wages Controlling for Geographic Access

Any model that is attempting to establish causation between charter enrollment and later-life outcomes must address the potential endogeneity created by a non-random set of families choosing charter schools. Our primary model specification addresses these concerns in a direct and reliable way. One issue that this specification may not completely address is potential lack of geographic access to charter ninth grade.

Geographic access to traditional schools is straightforward due to districts' use of attendance boundaries. A student that lives within the established attendance boundary for a school has geographic access to that school, as TPS provide bus transportation to and from school. For start-up charter schools, geographic access is not quite so straightforward. If a district contains a start-up charter high school, any student residing in the district technically has access to that charter school. Those schools may be too far away from a family's home to realistically consider attending, however, as charter schools generally do not provide transportation to and from school. The distance families are willing to travel to attend a charter school is unknown and likely a function of the observed school quality of the zoned TPS, as measured by standardized test scores.

If lack of geographic access to charter ninth grade restricts certain cohorts of eighth graders from charter ninth grade and this lack of geographic access is correlated with other variables of interest in our model, our findings could be over- or underestimating the effect start-up charter schools are having on later-life outcomes. This appendix summarizes an alternative specification which relaxes the restriction that both treatment and control students must have been enrolled in charter eighth grade. This change allows us to investigate the possibility that our results could be influenced by non-random geographic access to charter ninth grade.

In addition, this broadening of the sample size can help us determine whether the larger standard errors in our preferred model (leading to the 90% confidence interval) are due to the small sample size of the treatment group or are an accurate measure of the actual effect start-up charter schools have on wages. If we find a similar size effect that is statistically significant at the 95% confidence interval, that is evidence the preferred model suffered from the small sample size of the treatment group and the positive results are likely representative of the actual effect. If, on the other hand, a smaller effect or no effect is found with the alternative specification, this would suggest that larger standard errors are due to the effect actually being quite small or zero.

To attempt to control for geographic access to start-up charter schools, zip codes are identified by the number of ninth graders who reside in those areas and attended a non-virtual start-up charter in 2007–2012. Zip codes with at least one student resident who attended start-up, in-person charter ninth grade are considered areas of the state that offer geographic access to start-up charter ninth grade.

This method will proceed in two stages. In the first stage, logit probability modeling is applied to students residing in zip codes with geographic access to start-up charter ninth grade to estimate the probability of attending start-up charter ninth grade. This first-stage model includes an indicator for having attended charter school before ninth grade, eighth-grade test scores, average performance of the student's middle school, and demographics information as independent variables.

Table A1

First-Stage Results

	Start-Up Ninth Grade = 1
VARIABLES	Within Zip Codes with Access Only
K–8 Start-Up Charter Ever	2.724***
	(0.0414)
Eighth-Grade Standardized Math Score	-0.0326
	(0.0230)
Eighth-Grade Standardized English Score	0.0896***
	(0.0254)
Female = 1	0.00279
	(0.0324)
Gifted = 1	0.386***
	(0.0484)
American Indian = 1	-0.00948
	(0.330)
Asian = 1	0.968***
	(0.0548)
Black = 1	-0.118***
	(0.0420)
Hispanic = 1	-0.376***
	(0.0678)
Native Hawaiian = 1	-0.528
	(0.725)
Two or More Races = 1	-0.160
	(0.103)

	Start-Up Ninth Grade = 1
VARIABLES	Within Zip Codes with Access Only
Free Lunch Eighth Grade = 1	0.155***
	(0.0413)
School Average Sixth-Grade English Score	0.00451*
	(0.00265)
School Average Seventh-Grade English Score	-0.00806***
	(0.00298)
School Average Eighth-Grade English Score	0.0362***
	(0.00272)
Zip Code Average Income	-3.12e-06***
	(7.48e-07)
Constant	-31.38***
	(1.581)
Observations	163,470

Standard errors in parentheses.

*** p<0.01, ** p<0.05, * p<0.1

This first-stage model is then used to predict the baseline probability that all ninth-grade students in the state would have attended charter ninth grade *if they had geographic access*. The second stage matches all startup charter ninth-grade students with a student from a zip code without start-up charter ninth-grade geographic access that has a similar baseline probability of attending charter ninth grade. This set-up allows for the estimation of the effect start-up charter ninth grade has on later-life earnings for start-up charter ninth grade students compared to students that had a similar probability of attending a start-up charter ninth grade but lacked geographic access.

Table A2

Surt-up Churter Minin-Grude Student Quarterly Muges (in Dollars)	-Up Charter Ninth-Grade Student Quarterly Wa	ages (in Dollars)
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	QUARTERLY WAGES
Start-Up Charter Ninth Grade	810.0***
	(268.2)
Observations	64,113

Standard errors in parentheses.

*** p<0.01

Table A2 shows that under this specification, start-up charter ninth-grade students earned \$810 more per quarter when compared to the set of matched students. These estimates make some effort to control for potential endogeneity through the matching protocol. However, the matching protocol is deemed to be a less effective control for endogeneity than using charter eighth grade attendance, as in our preferred model specification. The larger effect on wages found here, after controlling for geographic access to charter high school, provides some evidence that our previous positive findings in the body of the report are not determined solely by a non-random set of school cohorts having geographic access to start-up charter ninth grade and creating positively biased estimates. These results also provide some evidence that the larger standard errors in our preferred model (leading to the 90% confidence interval) are due to the small sample size of the treatment group, as was discussed earlier.

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The Center for State and Local Finance's (CSLF's) mission is to develop people and ideas for next-generation public finance by bringing together the Andrew Young School's nationally ranked faculty and the broader public finance community. CSLF conducts innovative, nonpartisan research on tax policy and reform, budget and financial management, education finance, and economic development and urban policy. Additionally, it provides premier executive education in public finance for state and local finance officials and works with local and state partners on technical assistance projects on fiscal and economic policy.

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About the State Charter Schools Commission of Georgia

The State Charter Schools Commission of Georgia is a state-level, independent charter school–authorizing entity. The commission has the power to approve or deny petitions for commission charter schools and renew, nonrenew, or terminate commission charter school petitions in accordance with Georgia law.

While the Commission's duties are set forth in law and extend beyond simply authorizing schools, the Commission's principal obligations include:

- Reviewing charter school petitions for commission charter schools and assisting in the establishment of commission charter schools throughout Georgia;
- Developing and promoting best practices for charter schools and charter school cosponsors to ensure that high-quality charter schools are developed and encouraged;
- Promoting high standards of accountability for commission charter schools; and
- Monitoring and annually reviewing the academic and financial performance, including revenues and expenditures, of commission charter schools and holding the schools accountable for their performance pursuant to the charter.



SCSC Accountability: State Charter School Performance Reviews

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Introduction: SCSC Accountability

The mission of the SCSC is to improve public education throughout the state by approving high quality charter schools that provide students with <u>better</u> educational opportunities than they would otherwise be afforded in traditional schools. Thus, all state charter schools are expected to outperform the district(s) they serve, and the SCSC's accountability structure includes evaluations of both short-term and long-term performance. Specifically, each state charter school receives 1) annual performance evaluations to establish a school's progress toward renewal and 2) Five-Year Comprehensive Performance Reviews to establish whether a school's performance over time warrants a renewal recommendation. A state charter school that does not outperform the district or districts it serves will not be recommended for renewal.

Performance Review Structure

The State Charter Schools Commission of Georgia (SCSC) is required by law to monitor and review all state charter schools and hold them accountable for their performance. The SCSC holds schools accountable through both short-term and long-term evaluations. Specifically, SCSC accountability consists of:

- 1. Annual Performance Reviews;
 - On-site monitoring,
 - Assessment and publication of each school's academic, financial, and operational performance as measured by the SCSC Comprehensive Performance Framework, and
 - Performance Reviews and Presentations; and
- 2. Five-Year Comprehensive Performance Reviews.
 - Holistic review of each state charter school's long-term performance track record including, but not limited to, performance trends in the areas of academics, finances, and operations;
 - Interview between SCSC staff, SCSC commissioners, and state charter school representatives to discuss school performance and governance capacity; and
 - Consideration of charter renewal or the imposition of meaningful consequences such as nonrenewal or charter termination.

Annual Performance Reviews

Onsite Monitoring

Purpose. On-site monitoring is one of many tools that the SCSC uses to hold state charter schools accountable for acting in a manner that promotes the health, safety and education of all children. The SCSC is required to annually monitor and review state charter schools and hold them accountable for their performance. O.C.G.A. § 20-2-2083(b)(4) and SCSC Rule 691-2-.03 *State Charter School Monitoring*. Additionally, SCSC monitoring helps to ensure accountability for the proper use of taxpayer funding by state charter schools. Finally, SCSC monitoring helps promote high-quality charter schools by identifying concerns and incentivizing schools to correct noncompliance in a timely manner.

Monitoring focus. SCSC annual on-site monitoring is a focused effort to target identified areas of difficulty for state charter schools and test general compliance across a broad spectrum of applicable law. Because the SCSC cannot review every aspect of a school's operation for compliance on each applicable law, the SCSC selects specific areas to focus its monitoring activities. The SCSC selects where to focus its monitoring activities based on state charter school performance, previous issues, and concerns raised by stakeholders. While there may be some overlap across multiple years on key areas of concern, the SCSC generally concentrates monitoring activities on different areas of applicable law each year. The variation of attention of SCSC monitoring to different areas assists the SCSC and state charter schools in both remedying matters of concern and promoting generally compliant practices.

Monitoring preparation. Because SCSC on-site monitoring varies each year, SCSC staff will hold an information session and release the SCSC Monitoring Handbook prior to the start of the annual monitoring cycle to allow schools to prepare for on-site monitoring. Prior to conducting an onsite visit, SCSC staff requests specific information, policies, procedures, and forms from the school. In an effort to avoid placing undue administrative burdens on schools when conducting monitoring, the SCSC will collect and utilize documents from previous monitoring cycles as well as documents available on the school's website to evaluate a school's operational compliance in a variety of areas. The SCSC will utilize a documentation chart to indicate which documents were obtained from previous monitoring cycles, which documents were obtained from a school's website, and which documents the school will need to provide to staff for further review. The documentation chart will be shared with the school prior to onsite monitoring and will include instructions and a deadline for submission of additional materials. SCSC staff will review all the information the school provides prior to the on-site monitoring visit to enable efficient and knowledgeable discussion during the monitoring visit.

Monitoring timeline. The SCSC prioritizes the order in which schools are monitored. Schools that are in their first year of operation and schools that have a history of noncompliance are monitored earlier in the monitoring cycle to allow for more timely identification of potential noncompliance and provide opportunities for additional on-site visits later in the year if necessary. Conversely, schools that have an established record of compliance are monitored later in the monitoring cycle and often experience a more efficient on-site visit.

Monitoring visit. SCSC staff will conduct an unannounced site visit shortly after reviewing the documents submitted by the school. During this visit, SCSC staff will be onsite for 2-4 hours and will need to speak to individuals knowledgeable about the school's operations and finances, which may include the School Leader or his/her designee. Overall, the site visit is largely an opportunity for SCSC staff to observe practices and discuss procedures to ensure they align with applicable law and school policies. SCSC staff will also observe classes and review financial records, such as purchase orders, cancelled checks, and budget reports. At the conclusion of the visit SCSC staff will summarize the visit, discuss any identified concerns, and detail any additional actions required to be completed by the school.

Post-monitoring actions. After SCSC staff reviews the documentation provided by the school and conducts the unannounced on-site visit, SCSC staff will provide the school a monitor letter that details noncompliance requiring remediation. A school's monitoring letter may include two

classifications of identified items – 1) "findings" detail instances in which the school's actions or policies violate applicable law requiring immediate corrective action, and 2) "suggestions" detail the school's actions or policies that do not violate applicable law though the school may wish to reexamine or improve its operations to mitigate risk or prevent future noncompliance. If the Monitoring Letter includes findings, the school must provide a Corrective Action Plan which consists of a written response outlining the anticipated remedy for each instance of noncompliance as well as milestones for completing the required action. The SCSC may conduct additional site visits to verify that findings are corrected, and the SCSC will specifically monitor any findings the following year.

Results of annual on-site monitoring will be reflected in the on the operational portion of the school's annual Comprehensive Performance Framework* (CPF) report. If a state charter school receives a monitoring finding, the SCSC will deduct points from the correlating measure of operational compliance on the CPF. Additionally, Annual On-Site Monitoring results may be discussed in the school's Annual Performance Review and Presentation. If the SCSC identifies that a school is in a material breach of its charter contract through on-site monitoring activities, or if a school fails to adequately remedy noncompliance through its Corrective Action Plan, the SCSC may initiate charter termination proceedings.

*The Comprehensive Performance Framework (CPF) establishes accountability expectations, guides practice, assesses progress, and informs decision making over the course of the charter term and at renewal or revocation.

Assessment On the Comprehensive Performance Framework

Overview. As provided in in SCSC rule and in each state charter school contract, the SCSC utilizes a Comprehensive Performance Framework (CPF) to assess each state charter school in the areas of academic achievement, financial viability, and operational compliance. The CPF and its indicators and measures are incorporated into all charter contract as the accountability tool by which school performance is assessed. Thus, a school must meet expectations on the CPF to meet the academic, financial, and operational goals of its charter contract.

CPF standings are calculated and published on an annual basis to track each school's progress toward renewal. A school's collective CPF performance track record is used to inform decision making over the course of the charter term and at the time of the Five-Year Comprehensive Performance Review. A school's CPF standing is a reflection of whether the school has met the requirements and goals set forth in its charter contract, applicable law, and SCSC rule and policies

The three areas of performance covered by the CPF—academic achievement, financial management, and organizational compliance— correspond directly with the three components of a high-quality charter school application as well as the three areas on which a charter school's performance should be evaluated. In each of the three areas, the framework asks a fundamental question:

- 1. Academic Performance: Is the educational program offering students a better educational opportunity than they would otherwise receive at a traditional public school?
- 2. Financial Performance: Is the school financially viable?
- 3. Organizational Performance: Is the organization effective, compliant, and well-run?

Academic assessment under the CPF. To meet SCSC expectations, a state charter school must demonstrate that it provides a better educational opportunity than the district or districts it serves. A state charter school may satisfy this expectation by outperforming the district(s) it serves in terms of overall achievement, student growth, and/or value-added impact on student performance. Financial assessment under the CPF. State charter schools are required by law to obtain an independent financial audit every fiscal year. The results of that independent audit, including the school's financial statements, serve as the basis of the SCSC's annual assessment of school financial performance. The purpose of the SCSC's annual review of a school's financial performance is to determine if the school is fiscally responsible and financially viable on both near-term and sustainability measures.

Operational assessment under the CPF. Every year the SCSC will utilize a variety of methods to assess a school's operational performance and to determine if the organization is effective, compliant, and well-run. The operational section of the CPF includes broad categories containing specific measures and indicators aimed at ensuring the school's compliance with applicable laws, rules, and contractual provisions. Additionally, the operational section of the CPF holds schools accountable for maintaining a commitment to the essential and innovative features set forth within their charter contracts by tracking each school's ability to meet its established mission-specific goals.

CPF results. The results of a state charter school's annual academic, financial, and operational assessment under the CPF are provided to the school and will determine the school's participation in Annual School Performance Review Presentations. Poor performance in any category may also result in the SCSC's restriction of available grant funding as well as additional supports and interventions. If a school's annual assessment under the CPF reveals that the school is willfully noncompliant with material terms of its charter contract, the SCSC may initiate termination proceedings. Additionally, the SCSC compiles the annual operational analyses under the CPF through the 5-Year Comprehensive Performance Review that will determine whether the charter school is renewed or otherwise subject to meaningful consequences.

School Performance Reviews

Overview. The SCSC utilizes Annual Performance Reviews and Presentations to notify and engage schools and stakeholders on the topic of annual accountability standings and school progress towards charter renewal. SCSC Annual Performance Reviews and Presentations consist of two components: 1) the annual publication of school performance as measured by the CPF and 2) school-level performance presentations to SCSC commissioners and staff.

Publication of CPF reports. The SCSC annually assesses, compiles, and publishes academic, financial, and operational data relative to each school's performance on CPF measures. If a school does not earn all applicable points on a given measure, a detailed explanation is provided. The annual publication of CPF results outlines a school's current standing as well as its prospects for charter renewal and/or the imposition of consequences under the school's current contract.

School presentations. All state charter schools not meeting standards in all three areas (academics, finances, and operations) are required to deliver annual presentations to commissioners and staff at a public meeting. Annual presentations provide an opportunity for

schools to outline plans to improve performance in all areas of deficiency and respond to questions related to governance and practice. The SCSC does not infringe upon the autonomy of state charter schools to identify specific remediation efforts; however, the SCSC expects state charter schools to acknowledge and promptly address issues of noncompliance and nonperformance. School presentations are comprised of two primary components:

- Written Response The annual performance review begins with the school's response to a written survey that prompts the school to describe actions the governing board completed to address performance. The survey aims to identify whether the school is reviewing its performance, adapting its practices, and holding appropriate individuals and entities accountable. The school must respond with identifiable actions and provide evidentiary support to substantiate the implementation of its reforms.
- 2. Public Presentation Following the submission and evaluation of a school's written response, the school presents to commissioners at an SCSC meeting. The presentation allows the school to summarize its plan for improvement and present data to illustrate the school's progress. More importantly, the public presentation provides time and the opportunity for SCSC commissioners to discuss specific areas of concern with the school. While listening to a school's plan of action, SCSC commissioners highlight their expectations of strong academic, financial, and operational performance and note that the school must improve to meet SCSC standards to be eligible for a renewed charter term.

SCSC annual performance review presentations are designed to extrapolate meaningful information regarding school performance rather than excuses for performance and anecdotal reports of success. Additionally, a school participating in the annual performance review presentations develops an actionable plan to remediate nonperformance through its involvement in the process. Moreover, the annual performance review presentation, combined with the annual publication of school performance under the CPF creates a demonstrable record of school performance, efforts to remediate nonperformance, and the ultimate record and results of performance and remediation efforts to guide the SCSC in imposing meaningful consequences under the charter contract, including charter termination or nonrenewal.

Five-Year Comprehensive Performance Reviews

Overview. In the fifth year of a school's charter term, the SCSC will conduct a Five-Year Performance Review of the school's academic, financial, and operational performance over the preceding four years. Every state charter school receives a Five-Year Performance Review regardless of the term of the school's charter contract. For a school with a five-year charter contract, the Five-Year Performance Review determines whether the SCSC will renew the school's charter contract. For a school that has a charter contract term longer than five years, the Five-Year Performance Review allows the SCSC to conduct an in-depth, high-stakes review of school performance and impose meaningful consequences as necessary, up to and including charter termination.

Purpose. The purpose of the Five-Year Performance Review is to examine the charter school's holistic performance over time. The SCSC utilizes the Five-Year Performance Review to A) evaluate a school's overall ability to meet the goals of the charter contract and B) identify performance trends in the areas of academic achievement, financial viability, and operational compliance as measured through the CPF. In contrast with SCSC Annual Performance Reviews, the Five-Year Performance review assesses a complete and comprehensive track record of performance so as to determine whether a charter school merits contract renewal, nonrenewal, or other meaningful consequences.

Process. The Five-Year Performance Review requires schools to complete a short narrative that outlines the cumulative history of the school's academic, financial, and operational performance under its charter contract. The narrative provides the school the opportunity to contextualize its performance and discuss its efforts to remediate its operations if the school did not meet academic, financial, or operational performance at any point during its charter contract. The narrative should not be utilized to defend nonperformance or reiterate actions discussed during preceding annual performance reviews.

The Five-year Performance Review also requires the school's governing board and administrators to meet with SCSC staff and commissioners to discuss the school's performance. During the meeting, the school and the SCSC discuss the school's history of academic, financial, and operational results combined with the school's efforts as demonstrated in its annual performance reviews. The SCSC highlights its expectation that the school must outperform the district or districts it serves and the school demonstrates how it met that standard. If the school did not meet SCSC expectations to outperform its comparison district, the SCSC will prepare the school for nonrenewal of its charter contract or the initiation of charter termination proceedings.

SCSC actions and school consequences. The SCSC takes appropriate action and imposes meaningful consequences on schools not meeting standards as determined by the SCSC. The SCSC will impose consequences, including charter termination, in any year of the charter contract in which they are merited regardless of the term of the charter contract. Specific actions that the SCSC may take and school consequences that may be imposed include, but are not limited to:

- Corrective Action Plans: If the SCSC identifies that a state charter school is not in compliance with applicable law, rule, or regulation, the state charter school will be required to produce a written corrective action plan that is sufficiently detailed to allow the SCSC staff to determine how the school will remediate the issue and when the school will be in full compliance with applicable law. The SCSC will conduct additional monitoring of the school to determine if the corrective action has been completed and whether the school remediated its noncompliance. Any failure by the school to fulfill its corrective action will result in additional consequences, including charter termination.
- 2. Required Training: If the SCSC identifies systemic failures that can be improved or eliminated through subject-specific training, the SCSC may require state charter school governing board members or staff to attend specified trainings and display improved practices as measured by increased performance.

- 3. Restriction on Expansion: State charter schools that are not able to demonstrate academic, financial, and operational effectiveness through SCSC periodic reviews will not be permitted to expand operations. The SCSC will not approve expansion of grade levels, an increase in student population, or additional school sites or locations if the school does not meet performance measures in the outlined in the CPF and confirmed through SCSC annual review.
- 4. Restriction of Grant Funding: The SCSC provides grants to schools for both specific and general purposes; however, if the SCSC identifies areas of noncompliance or issues of concern as part of its comprehensive review, the SCSC will reduce, restrict, or eliminate a school's access to SCSC grant funding. For example, if the SCSC identifies possible financial mismanagement as part of its review, the SCSC may require the school to utilize a portion of the SCSC Administration Refund Grant to hire an independent forensic auditor.
- 5. Reduction of State or Federal Funding: If the SCSC, or another state or federal agency, identifies noncompliance with rule or law that requires the return or withholding of state or federal funding, the SCSC will cooperate with all appropriate parties and implement its contractual authorities to ensure the proper use of public funding.
- 6. Charter Termination: If the SCSC's annual or 5-year Performance reviews indicate that a state charter school is in material breach of its charter contract, including failing to consistently meet academic, financial, and operational performance expectations, the SCSC will initiate charter termination proceedings. The SCSC will also initiate charter termination proceedings if the SCSC review reveals grounds for termination outlined in Georgia law or the school's charter contract, including, but not limited to, the school's failure to adhere to generally accepted fiscal management or if the continued existence of the school is contrary to the best interest of its students or community.

The SCSC will identify and implement consequences as outlined in the charter contract and in proportion to a school's noncompliance. A state charter school that demonstrates the ability to remedy noncompliance within its autonomy will remain in good standing and be eligible for charter contract renewal provided the school meets SCSC academic, financial, and operational expectations. A state charter school that is not able to improve noncompliance will receive additional and more severe consequences imposed by the SCSC. If necessary, the SCSC will initiate charter termination proceedings without regard to the term of the school's charter contract. A state charter school that is not meeting SCSC academic, financial, and operational standards as evidenced through its Five-Year Performance Review will not receive a renewed charter contract.

Conclusion

The SCSC is committed to ensuring state charter schools meet academic, financial, and operational standards that promote high-quality charter schools that will provide better educational outcomes for their students. In so doing, the SCSC Comprehensive Performance

Review of state charter schools is designed to gather continual data regarding school operations through a thorough system of annual on-site monitoring and analysis of data under the SCSC Comprehensive Performance Framework. Further, the annual publication of school performance combined Annual Performance Reviews and School Presentations provides a clear understanding of the school's outcomes in comparison with SCSC expectations to deliver the school and stakeholders an explicit outlook towards charter renewal. The SCSC upholds its commitment and statutory charge to support high-quality charter schools through its Five-Year Performance Review that thoroughly examines a school's track record of performance under its charter contract to guide the SCSC in determining whether to renew the charter contract or impose other meaningful consequences under the contract.



COMPREHENSIVE PERFORMANCE FRAMEWORK for State Charter School Evaluation

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OVERVIEW:

Comprehensive Performance Framework for State Charter Schools

PURPOSE

Quality charter school authorizers establish standards for school performance that are clear, quantifiable, rigorous, and attainable. The SCSC Performance Framework includes academic, financial, and organizational performance measures that establish expectations, guide practice, assess progress, and inform decision making over the course of the charter term and at renewal or revocation.

The three areas of performance covered by the frameworks—academic achievement, financial management, and organizational compliance – correspond directly with the three components of a strong charter school application and are the three areas on which a charter school's performance should be evaluated. In each of the three areas, the framework asks a fundamental question:

- 1. Academic Performance: Is the educational program offering students a better educational opportunity than they would otherwise receive at a traditional public school?
- 2. Financial Performance: Is the school financially viable?
- 3. Organizational Performance: Is the organization effective, compliant, and well run?

SCSC PERFORMANCE EXPECTATIONS

State Charter Schools are expected to meet academic, financial, and operational standards during every year of the charter term. However, schools that demonstrates a consistent track record of strong performance over multiple years may earn a standard five-year renewal. Additionally, schools that finish their first charter term strong (despite early struggles), and schools that consistently perform on par with the attendance zone they serve may earn an abbreviated three-year charter renewal. The intent of an abbreviated charter term is to assess the school's ability to sustain the requisite performance level.

SCSC renewal eligibility criteria are meant to serve as a guideline to inform renewal decisions. However, the SCSC may exercise discretion in approving renewal terms outside of these guidelines.

A New School (i.e. a school concluding its first/initial charter term):

To earn for a standard five-year renewal, a school must:

- A. meet financial and operational standards at least 50% of the time (2 of 4 years), OR
- B. meet financial and operational standards in Year 4 of the charter term, AND
- meet academic standards at least 75% of the time (3 of the first 4 years of a 5-year charter contract term).

To earn an abbreviated three-year renewal, a school must:

- must meet financial and operational standards in Year 4 of the charter term, AND •
- A. perform at least as well as¹ (no more than 3% below) the attendance on any one or combination of the CCRPI indicators in all relevant grade bands in Year 4 of the charter term, OR
- B. outperform on the VAM or be designated BTO in Year 4 of the charter term, OR
- C. perform at least as well as the attendance zone on any one or combination of the CCRPI indicators outlined within the CPF, 75% of the time.

¹ The phrase "as well as" in terms of state charter school renewal eligibility equates to having a score that is no more than 3% below the comparison attendance zone score. SCSC Performance Framework

A Tenured School (i.e. a school concluding a second or subsequent charter term):

To earn a standard five-year renewal, a school must:

• meet academic, financial and operational standards for a majority of the contract term (3 of the first 4 years of a 5-year charter contract term or 2 out of 3 years of a 3-year charter contract term).

To earn an abbreviated three-year renewal, a school must:

- meet financial and operations standards 75% of the time AND
- meet academic standards or perform at least as well as the attendance zone on any one or combination of the CCRPI indicators outlined within the CPF 75% of the time.

FUNDAMENTAL QUESTION

Is the educational program offering students a better educational opportunity than they would otherwise receive at the traditional public school?

INDICATORS

To answer the above question, the SCSC uses performance metrics derived from:

- the <u>College and Career Readiness Performance Index (CCRPI)</u>, the statewide accountability tool. The CCRPI includes a content mastery component that assess student proficiency and a progress component that uses student growth percentiles to assess student growth. And from,
- Two statistical predictive measures that take into consideration the school's student body make-up, the <u>Value-Added</u> <u>Model (VAM)</u> and the <u>Beating the Odds (BTO)</u> measure.

MEETING GOALS

A state charter school can <u>meet</u> annual SCSC academic accountability standards by outperforming its attendance zone² in terms of student achievement or growth as measured by the CCRPI Single Score, CCRPI Content Mastery, CCRPI Progress, CCRPI Grade Band Score, Value-Added Model impact scores, Beating the Odds designation.

A state charter school only needs to outperform the district(s) it serves on one, not all, of the academic metrics. For schools that serves multiple grade bands, a combination of grade band measures (CCRPI Content Mastery, CCRPI Progress, CCRPI Grade Band, and Value-Added Model (VAM) scores) can be used to demonstrate performance. The school must outperform the district(s) it serves on any one or combination of grade band measures in all grade bands served.

SECTION I, ACADEMIC PERFORMANCE MEASURES

Measure 1, CCRPI Single Score	Designation
Is the school annually outperforming the attendance zone (as measured CCRPI single score)?	
Meets Standard:	
• The charter school earned a higher CCRPI "single score" than the attendance zone	
Approaches Standard:	i.e. Meets Standard
• The charter school earned a CCRPI "single score" that is the same as ² the attendance zone	
Does Not Meet Standard:	
The charter school earned a lower CCRPI "single score" than the attendance zone	

Measure 2, Student Achievement Is the school annually outperforming the attendance zone (as measured by grade-band CCRPI content mastery scores)?	<u>Designation</u> <u>Earned</u>
Meets Standard:	
• The charter school earned a higher "content mastery" score on the CCRPI than the attendance zone	
in all grade bands served (elementary, middle, and/or high school).	
Approaches Standard:	
• The charter school earned a CCRPI "content mastery" score that is the same as ² or higher than the	
attendance zone in at least one—but not allof the grade bands served (elementary, middle, and/or	
high school).	
Does Not Meet Standard:	
• The charter school earned a lower "content mastery" score on the CCRPI than the attendance zone in	
all of the grade bands served (elementary, middle, and/or high school).	

² A description of the methods used to calculate attendance zone comparisons scores can be found on page 5. SCSC Performance Framework PR/Award # S282A220006

Measure 3, Student Growth Is the school annually outperforming the attendance zone (as measured by grade-band CCRPI progress	<u>Designation</u> <u>Earned</u>
scores)?	Lamed
Meets Standard:	
• The charter school earned a higher "student progress" score on the CCRPI than the attendance zone in all grade bands served (elementary, middle, and/or high school) OR in all grade bands in which the school did not earn a higher CCRPI "content mastery" score.	
Approaches Standard:	
 The charter school earned a CCRPI "student progress" score that is the same as² or higher than the attendance zone in at least one—but not allof the grade bands served (elementary, middle, and/or high school). 	
Does Not Meet Standard:	
 The charter school earned a lower "student progress" score on the CCRPI than the attendance zone in all the grade bands served (elementary, middle, and/or high school). 	
Measure 4, Grade Band Score	
Is the school annually outperforming the attendance zone (as measured by grade-band CCRPI grade band scores)?	<u>Designation</u> <u>Earned</u>
Meets Standard:	
• The charter school earned a higher "grade band score" on the CCRPI than the attendance zone in all grade bands served (elementary, middle, and/or high school) OR in all grade bands in which the school did not earn a higher CCRPI "content mastery" or "progress" score.	
Approaches Standard:	
 The charter school earned a CCRPI "grade band" score that is the same as² or higher than the attendance zone in at least one—but not allof the grade bands served (elementary, middle, and/or high school). 	
Does Not Meet Standard:	
 The charter school earned a lower "grade band" score on the CCRPI than the district(s) it serves in all the grade bands served (elementary, middle, and/or high school). 	
Measure 5, Value-Added Model (VAM) Impact Scores	
	<u>Designation</u> Earned
Is the school annually outperforming the attendance zone (as measured by value-added impact scores)?	Lameu
 Meets Standard: The charter school earned a higher "impact score" on the VAM than the attendance zone in all grade bands served (elementary, middle, and/or high school) OR in all grade bands in which the school did not earn a higher CCRPI "content mastery", "progress", or "grade band" score. 	
Does Not Meet Standard:	
• The charter school earned a lower "impact" score on the VAM than the attendance zone in all the grade bands served (elementary, middle, and/or high school).	
Measure 6, Beating the Odds	Designation
Is the school "beating the odds" as determined by the Georgia Department of Education?	Earned
Meets Standard:	
• The charter school was designated as "beating the odds."	

Does Not Meet Standard:

• The charter school was not designated as "beating the odds."

SECTION I: OVERALL DETERMINATION OF COMPLIANCE

As measured by the indicators and measures set forth in this section, is the school meeting academic performance standards? The school only needs to outperform the district(s) it serves on one, *not all*, of the academic metrics in order to meet standards.

Meets Standards	Outperforms the district(s) it serves
Approaches Standards	Performs the as well as the district(s) it serves
Does Not Meet Standards	Performs below the district(s) it serves

SCORING CATEGORIES:

ATTENDANCE ZONE- COMPARISON SCORE CALCULATION METHODS

The SCSC uses three methods to calculate comparison attendance zone scores when assessing state charter school performance on the CCRPI:

- **District Average:** The state charter school's score is compared to the score of the district(s) included in its attendance zone. If a school serves a single district, it is compared to that district's score. If it serves multiple districts it is compared to the simple average of those districts. If the school has a statewide attendance zone, then the school is compared to the state average. The SCSC uses GaDOE CCRPI reports to determine the comparison scores.
- District Weighted: The state charter school's score is compared to a "District Weighted" score that uses the
 proportion students the school enrolls from each district served. If a school serves a single district, it is compared to
 that district's score because 100% of students enrolled in the state charter school are zoned to attend that district.
 However, if a school serves multiple districts or has a statewide attendance zone, a district weighted comparison
 score is generated based on the proportion of students the school actually enrolls from each district. For instance, if a
 school enrolls 80% of its students from District A and 20% from District B, then the comparison score will be
 comprised of 80% of District A's CCRPI score and 20% of District B's CCRPI score. The SCSC uses the GaDOE Data
 Collections FTE System of Residency report to determine district enrollment proportions.
- School Weighted: The state charter school's score is compared to a "School Weighted" score that uses the proportion of students the school enrolls from each school attendance zone served. The student -level address element in the GaDOE Data Collections Student Record report, is used to determine which school each student enrolled in a state charter school is actually zoned to attend (the school the student would attend if they were not enrolled in the charter school). The SCSC weights those schools' CCRPI scores based on the proportion of students enrolled. This is same process that is used to generate the District Weighted comparison scores just at the more granular, school level.

NOTE: A school is considered meeting standards if it outperforms any on one or combination of the comparison calculations across academic metrics.

SECTION II: FINANCIAL PERFORMANCE

Fundamental Question

Is the school fiscally responsible and financially viable?

Indicators

To answer the above question, the SCSC uses a data, mostly derived from each school's independent financial audit, to assess a schools performance on near-terms measures, which are used to calculate a charter school's ability to cover its short term (less than 1 year) financial obligations and sustainability measures which are used to determine a charter school's ability to cover long term obligations as well as their ability to effectively control cost.

- 1. The near-term measures include current ratio, unrestricted days cash, enrollment variance, debt to income ratio and a default measure.
- 2. The sustainability measures include an efficiency margin and debt to asset ratio.

Meeting Goals

In any year of the charter term, a state charter school will satisfy annual financial accountability requirements by earning enough points across near-term and sustainability measures to secure of financial score of at least 80 which equates to meeting financial standards.

SECTION II, INDICATOR 1: NEAR-TERM MEASURES

Measure 1a, Current Ratio (Working Capital Ratio): Current assets divided by current liabilities	<u>Points</u>
Does the school have the ability to cover short-term financial obligations?	<u>Available</u>
Meets Standard:	15
Current Ratio is greater than 1.0	15
Approaches Standard:	10
• Current Ratio is between 0.9 and 1.0 or equal to 1.0	10
Does Not Meet Standard:	
Current Ratio is less than or equal to 0.9	0
Measure 1b, Unrestricted Days Cash: Unrestricted Cash divided by (Total Expenses/365)	<u>Points</u>
Does the school maintain an appropriate balance of cash on hand?	<u>Available</u>
Meets Standard:	15
Days Cash is greater than 45 days	15
Approaches Standard:	10
• Days Cash is between 15 and 45 days	10
Does Not Meet Standard:	
Less than 15 Days Cash	0
Measure 1c, Enrollment Variance: [Actual Enrollment during the October FTE Count (fiscal year x) –	
school enrollment projection (fiscal year X)] / school enrollment projection (fiscal year X)	<u>Points</u>
Is the school able to project enrollment in a way that enables them to adequately budget?	<u>Available</u>
Meets Standard:	15
Enrollment Variance equals less than 2 percent	15
Approaches Standard:	
Enrollment Variance is between 2 and 8 percent	10
Does Not Meet Standard:	
Enrollment Variance is greater than 8 percent	0
Measure 1d, Annual Debt to Income (DTI): Total Annual Debt Payments (Debt Service) / Total Revenue	Points
Does the school have enough income to cover short-term debt payments?	Available
Meets Standard:	15
Annual DTI is below 5 percent	15

Approaches Standard:	10
Annual DTI is between 5 and 15 percent	10
Does Not Meet Standard:	0
Annual DTI is above 15 percent	0
Measure 1e, Default	Points
Is the school repaying debts in a timely manner?	
Meets Standard:	
• School is not in default of loan covenant(s) and/or is not delinquent with debt service payments or the	10
school does not have any outstanding debt	
Does Not Meet Standard:	0
• School is in default of loan covenant(s) and/or is delinquent with debt service payments	0

Total Points Available—Section II, Indicator 1: 70 points

Section II, Indicator 2: Sustainability Measures

Measure 2a, Efficiency Margin: (Change in Net Assets+Change in Pension Related Accts) divided by Total Revenues Does the school manage costs appropriately?	<u>Points</u> <u>Available</u>
 Meets Standard: Aggregated Three-Year Efficiency Margin is greater than 0. 	15
 Approaches Standard: Aggregated Three-Year Efficiency Margin is between01 and -10 percent 	10
 Does Not Meet Standard: Aggregated Three-Year Efficiency Margin is less than -10 percent 	0
Measure 2b, Debt to Asset Ratio: (Total Liabilities-Deferred Pension Liability) divided byTotal AssetsDoes the school maintain an appropriate balance between assets and liabilities over time?	<u>Points</u> <u>Available</u>
 Meets Standard: Debt to Asset Ratio is less than 95 percent 	15
 Approaches Standard: Debt to Asset Ratio is between 95 and 100 percent 	10
Does Not Meet Standard: • Debt to Asset Ratio is greater than 100 percent	0

Total Points Available—Indicator 2: 30 points

SECTION II: DETERMINATION OF COMPLIANCE

As measured by the indicators and measures, is the school meeting financial performance standards?

SCORING CATEGORIES:

80-100 pts.	Meets Financial Performance Standards
70-79 pts.	Approaches Financial Performance Standards
0-69 pts.	Does Not Meet Financial Performance Standards

Fundamental Question

Is the organization effective, compliant, and well run?

Indicators

In order to answer the question above, the SCSC uses data from agency monitoring and other sources as noted in the appendix of this document to determine compliance with the indicators listed below.

- 1. The school's educational program, such as adherence to its essential or innovative features and implementation of required programs;
- 2. Financial oversight such as adherence to GAAP standards;
- 3. Governance capacity and transparency
- 4. Protecting students and employees through the appropriate use of compensatory programs and employee qualifications
- 5. Maintaining a positive school environment by promoting student retention and support services
- 6. Any additional obligations including the timely remediation of previous noncompliance.

Meeting Goals

In any year of the charter term, a state charter school will be deemed operationally compliant if it adheres to the requirements of its charter contract as well as all applicable rules and laws as measured by indicators 1-6 listed above, thus earning a score of at least 80 in the Operations section of the CPF.

Section III, Indicator 1: Educational Program Compliance

A charter school's overall purpose is to provide its students a quality and innovative educational program. Schools must adhere to the educational program identified in its charter contract that was awarded on the basis of the program outlined in its petition.

Measure 1a, Essential or Innovative Features and Mission-Specific Goals	
Is the school implementing all essential or innovative features of its program as defined in its	<u>Points</u>
current charter contract, and is the school's curricular and educational program aligned with its	
stated mission as evidence through the attainment of mission-specific goals?	
Meets Standard:	
 The school has fully implemented all essential or innovative features of its education and operational program as defined in the charter contract in all material respects and the school has met all mission- specific goals included in its charter contract (if applicable) 	4
Approaches Standard:	
• The school has at least fully implemented one essential or innovative features of its education and operational program as defined in the charter contract in all material respects or the school has met at least one mission-specific goals included in its charter contract (if applicable).	2
Does Not Meet Standard:	
• The school failed to fully implement any essential or innovative features of its education and operational	0
program as defined in the charter contract in all material respects and the school failed to meet any	U
mission-specific goals included in its charter contract (if applicable).	
Measure 1b, State Education Requirements	<u>Points</u>
Is the school complying with applicable state education requirements?	<u>Available</u>
Meets Standard:	
• The school complied with all applicable state laws, rules, regulations, provisions of its charter contract, and	
the school's own policies and procedures relating to state education requirements, including but not limited	
to:	4
 Provided all state mandated programs; 	
 Adhered to graduation requirements; 	
 Implemented state-adopted content standards; and Administered state assessments in the manager required by law and rule 	
 Administered state assessments in the manner required by law and rule. 	

 Approaches Standard: The school failed to comply at least one applicable state law, rule, regulation, provision of the charter 	
contract, or the school's own policies and procedures relating to state education requirements during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance.	2
Does Not Meet Standard:	
 The school failed to comply with at least one applicable state law, rule, regulation, provision of the charter contract, or the school's own policies and procedures relating to state education requirements. 	0
Measure 1c, Federal Education Requirements	Points
Is the school complying with applicable federal education requirements?	Available
Meets Standard:	
• The school complied with all applicable federal laws, rules, regulations, and the school's own policies and	
procedures relating to federal education requirements, including but not limited to:	
 Federal assessment security and reporting of accountability requirements; and 	4
 Charter School Program grant, Title I, IV, and V requirements. 	
 McKinney-Vento Homeless Assistance Act, Charter School Program grant, Title I, IV, and V requirements. 	
Approaches Standard:	
• The school failed to comply with at least one applicable federal law, rule, regulation, provision of the	2
charter contract, or the school's own policies and procedures relating to federal education requirements.	
Does Not Meet Standard:	
• The school failed to comply with two or more applicable federal laws, rules, regulations, provisions of the	0
charter contract, or the school's own policies and procedures relating to federal education requirements.	
Measure 1d, Data Reporting	<u>Points</u>
Is the school complying with all data and financial reporting requirements?	<u>Available</u>
Meets Standard:	
• The school complied with all applicable laws, rules, regulations, and provisions of its charter contract	
relating to relevant reporting requirements, including timelines and deadlines, to the SCSC, GaDOE, and/or	
federal authorities, including but not limited to:	
 QBE/FTE Data Reporting; 	
 Personnel Reporting; 	
 Student Record Reporting; 	~
 CCRPI Data Reporting; Constitute of Each statements of the Court of th	5
 Consolidated LEA Implementation Plan (CLIP) for federal programs; Special Education Data Reporting; 	
 Special Education Data Reporting; Required Data Surveys; 	
 Complete and on-time submission of financial reports, such as its annual budgets, revised 	
budgets, and/or DE 046, in the manner prescribed by GaDOE or the SCSC;	
 Timely periodic financial reports as required by the SCSC, GaDOE, or other state agency; 	
On-time submission and completion of its annual independent audit by the deadline established by the SCSC.	
Approaches Standard:	
• The school failed to comply with one applicable law, rule, regulation, or provision of its charter contract	2
relating to relevant reporting requirements, including timelines and deadlines, to the SCSC, GaDOE, and/or	3
federal authorities. Does Not Meet Standard:	
Does Not Meet Standard:	
 Does Not Meet Standard: The school failed to comply with two or more laws, rules, regulations, or provisions of its charter contract 	0
Does Not Meet Standard:	0

Total Points Available—Section III, Indicator 1: 17 points

Section III, Indicator 2: Financial Oversight

Charter schools must be faithful stewards of public funding and must adhere to stringent standards in the management of its assets. Failure to do so is one of the leading causes of charter school closure.

Is the school following Generally Accepted Accounting Principles (GAAP)?	<u>Availat</u>
 Meets Standard: The school complied with all applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations as evidenced by an annual independent audit that includes: An unqualified audit opinion; An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses; An audit that does not include a going concern disclosure in the notes or an explanatory paragraph; and 	5
 No other adverse statement indicating noncompliance with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight. Does Not Meet Standard: 	
 The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter contract relating to financial management and oversight expectations as evidenced by an annual independent audit. 	0
Measure 2b, Adherence to Federal Financial Requirements Is the school following all applicable financial requirements when expending federal funds?	<u>Point</u> Availat
 Meets Standard: The school complied with all applicable laws, rules, regulations, and provisions of the charter contract relating to proper internal controls, expenditures, inventory, drawdowns, and cost principles when expending federal funds, including but not limited to: Proper segregation of duties; Source documentation for expenditures paid with federal funds; Complete and on-time submission of program budgets (Title I, IDEA, and grant budgets); and Maintaining inventory controls and documentation in accordance with federal regulations for items purchased with federal funds. 	4
 Approaches Standard: The school failed to comply with all applicable laws, rules, regulations, and provisions of the charter contract relating to proper internal controls, expenditures, inventory, drawdowns, and cost principles when expending federal funds during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance. 	2
 Does Not Meet Standard: The school failed to comply with all applicable laws, rules, regulations, and provisions of the charter contract relating to proper internal controls, expenditures, inventory, drawdowns, and cost principles when expending federal funds. 	0
Measure 2c, Adherence to the Local Units of Administration Manual Is the school following the Local Units of Administration (LUA) Manual?	<u>Point</u> Availal
 Meets Standard: The school complied with all material provisions of the LUA manual. 	4
 Approaches Standard: The school failed to comply with at least one material provision of the LUA manual during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance. 	2
 Does Not Meet Standard: The school failed to comply with one or more material provisions of the LUA manual. 	0
Measure 2d, Adherence to the School's Own Financial Policies and Procedures	Point Availat
Is the school adhering to its own financial policies and procedures?	<u>Availal</u>

Meets Standard:	
• The school adhered to its own financial policies and procedures approved by the school's governing board and/or developed by school staff.	4
Approaches Standard:	
 The school failed to comply with at least one of its own financial policies and/or procedures approved by the school's governing board and/or developed by school staff, but the school adequately remedied its finding(s) and regained compliance. 	2
Does Not Meet Standard:	
• The school failed to comply with at least one of its own financial policies and/or procedures approved by the school's governing board and/or developed by school staff.	0
Measure 2e, Budget Approved in Accordance with State Law	Points
Did the school approve its budget in accordance with state law?	<u>Available</u>
Meets Standard:	
• The school's budget was approved in accordance with state law, including but not limited to preforming the following items from O.C.G.A. § 20-2-167.1 related to the school's budget approval:	
 Conducting two public meetings to provide an opportunity for public input on the proposed budget; New Measure Added 	4
 Advertising the two public meetings in the school's legal organ; and 	
 Making a summary of the proposed annual operating budget a publicly available area of the school's website. 	
Does Not Meet Standard:	
• The school failed to comply with at least one applicable state law requirement regarding the passage of the school's annual budget.	0

Total Points Available—Section III, Indicator 2: 21 points

Section III, Indicator 3: Governance and Transparency

A charter school's governing board must provide adequate oversight of school management and operations to ensure that the school is fulfilling its duties to students, employees, parents, and the general public.

Measure 3a, General Governance	<u>Points</u>
Is the governing board complying with all applicable general governance requirements?	<u>Available</u>
Meets Standard:	
• The school complied with all applicable laws, rules, regulations, provisions of its charter contract, and its	
policies relating to governance by its board, including but not limited to:	
 Board policies; 	
o Board bylaws;	4
 Code of ethics; 	
 Conflicts of interest; 	
 Board composition and/or membership laws and rules; and 	
 Restrictions on compensation. 	
Approaches Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, provision of the charter	2
contract, or its policies relating to governance by its governing board during its SCSC onsite or desk	2
monitoring visit, but the school adequately remedied its finding(s) and regained compliance.	
Does Not Meet Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, provision of the charter	0
contract, or its policies relating to governance by its board.	
Measure 3b, Open Governance	Points
Is the governing board complying with all applicable open governance requirements?	<u>Available</u>
Meets Standard:	
• The school complied with all applicable laws, rules, regulations, provision of its charter contract, and its	4
policies relating to the Georgia Open Meetings Act and Open Records Act requirements.	

Approaches Standard:	
 The school failed to comply with all applicable laws, rules, regulations, provision of its charter contract, or its policies relating to the Georgia Open Meetings Act and Open Records Act requirements during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance. 	2
Does Not Meet Standard:	
• The school failed to comply with all applicable laws, rules, regulations, provision of its charter contract, or	0
its policies relating to the Georgia Open Meetings Act and Open Records Act requirements.	
Measure 3c, Governance Training	<u>Points</u>
Is the governing board complying with all applicable governance training requirements?	<u>Available</u>
Meets Standard:	
• The school took action to ensure that all governing board members comply with all applicable laws, rules,	
regulations, provision of its charter contract, and its policies relating to the participation of its governing	4
board in required trainings, including, but not limited to, annual attendance by the entire governing board	
at SCSC provided or approved training pursuant to O.C.G.A. § 20-2-2084(f).	
Does Not Meet Standard:	
• The school failed to take action to ensure that all governing board members comply with all applicable laws,	0
rules, regulations, provision of its charter contract, and its policies relating to the participation of its governing board in required trainings, including, but not limited to, annual attendance by the entire	0
governing board in required trainings, including, but not initial to, annual attendance by the entire governing board at SCSC provided or approved training pursuant to O.C.G.A. § 20-2-2084(f).	
	Points
Measure 3d, Transparent Governance and Communication with Stakeholders	<u>Points</u> Available
Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders?	Points Available
Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard:	
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Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: • The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to:	Available
Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: • The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to: • Following provisions in SCSC rule 691-203 regarding providing the public easy access to informational items on the school's website; • Communicating school leadership and other major school changes in a timely and transparent	Available
Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: • The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to: • Following provisions in SCSC rule 691-203 regarding providing the public easy access to informational items on the school's website; • Communicating school leadership and other major school changes in a timely and transparent matter; and	Available
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Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: • The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to: • Following provisions in SCSC rule 691-203 regarding providing the public easy access to informational items on the school's website; • Communicating school leadership and other major school changes in a timely and transparent matter; and • Appropriately and promptly responding to stakeholder complaints, questions, and concerns.	Available
 Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to: Following provisions in SCSC rule 691-203 regarding providing the public easy access to informational items on the school's website; Communicating school leadership and other major school changes in a timely and transparent matter; and Approaches Standard: The school failed to comply with all applicable laws, rules, regulations, provisions of its charter contract, or The school failed to comply with all applicable laws, rules, regulations, provisions of its charter contract, or The school failed to comply with all applicable laws, rules, regulations, provisions of its charter contract, or 	<u>Available</u>
 Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to:	Available
Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: • The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to: • Following provisions in SCSC rule 691-203 regarding providing the public easy access to informational items on the school's website; • Communicating school leadership and other major school changes in a timely and transparent matter; and • Appropriately and promptly responding to stakeholder complaints, questions, and concerns. Approaches Standard: • The school failed to comply with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained	<u>Available</u>
 Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to: Following provisions in SCSC rule 691-203 regarding providing the public easy access to informational items on the school's website; Communicating school leadership and other major school changes in a timely and transparent matter; and Approaches Standard: The school failed to comply with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders and concerns. 	<u>Available</u>
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 Measure 3d, Transparent Governance and Communication with Stakeholders Is the governing board operating transparently and effectively communicating with stakeholders? Meets Standard: The school complied with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders, including but not limited to: Following provisions in SCSC rule 691-203 regarding providing the public easy access to informational items on the school's website; Communicating school leadership and other major school changes in a timely and transparent matter; and Approaches Standard: The school failed to comply with all applicable laws, rules, regulations, provisions of its charter contract, or its policies relating to operating transparently and effectively communicating with stakeholders and concerns. 	<u>Available</u>

Total Points Available—Section III, Indicator 3: 16 points

III, Indicator 4: Students and Employees

Families entrust schools with the education and welfare of their children, and the school must afford those children the appropriate rights and care. The school must respect its employees and ensure that they are duly qualified to further the education and welfare of students.

Measure 4a, Rights of All Students	<u>Points</u> Available
Is the school protecting the rights of all students?	Available
 Meets Standard: The school complied with all applicable laws, rules, regulations, provisions of its charter contract, and its policies relating to the rights of students, including but not limited to: Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment); The collection and protection of student information (that could be used in discriminatory ways or otherwise contrary to law); Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction; and Conduct of discipline (discipline hearings and suspension and expulsion policies and practices). 	5
Approaches Standard:	
 The school failed to comply with at least one applicable law, rule, regulation, provision of its charter contract, or its policies relating to the rights of students during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance. 	3
Does Not Meet Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, provision of its charter	0
contract, or its policies relating to the rights of students.	
Measure 4b, Rights of Students with Disabilities	Points
Is the school protecting the rights of students with disabilities? Meets Standard:	<u>Availabl</u>
 Consistent with the school's status and responsibilities as a Local Education Agency (LEA), the school complied with all applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including but not limited to:	5
 Approaches Standard: The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter contract relating to the treatment of students with identified disabilities and those suspected of having a 	3
disability during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance.	
Does Not Meet Standard:	
 The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter contract relating to the treatment of students with identified disabilities and those suspected of having a disability. 	0
Measure 4c, Rights of Students who are English Learners (ELs)	<u>Points</u>
Is the school protecting the rights of English Learners (ELs)?	<u>Availabl</u>
Meets Standard:	5

• The school complied with all applicable provisions of Title III of the Every Student Succeeds Act (ESSA) and all applicable state and federal laws, rules, regulations, and provisions of its charter contract relating to EL	
requirements, including but not limited to:	
 Required policies related to the service of EL students; 	
 Proper steps for identification of students in need of EL services; 	
 Appropriate and equitable delivery of services to identified students; 	
 Appropriate accommodations on assessments; 	
 Exiting of students from EL services; and 	
Ongoing monitoring of exited students.	
Approaches Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter	3
contract relating to EL requirements during its SCSC onsite or desk monitoring visit, but the school	
adequately remedied its finding(s) and regained compliance.	
Does Not Meet Standard:	
	0
contract relating to EL requirements.	
Measure 4d, Employee Qualifications, Evaluations, and Criminal Records Checks	inte
is the school meeting teacher and other employee qualification and criminal background check	<u>ints</u> ilable
requirements?	liable
Meets Standard:	
• The school complied with all applicable laws, rules, regulations, and provisions of its charter contract relating	
to employee qualifications, employee evaluations, and criminal background checks, including but not limited	
to	
o Title II, Part A requirements;	4
 Implementation of the Teacher and Leader Keys Effectiveness Systems (TKES and LKES); 	
• Ensuring staff have a proper background check or clearance certificate issued by the Georgia	
Professional Standards Commission.	
Approaches Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter	
	2
requirements during its SCSC onsite or desk monitoring visit, but the school adequately remedied its	
finding(s) and regained compliance.	
Does Not Meet Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter	0
contract relating to employee qualifications, employee evaluations, and criminal background checks	0
requirements.	
Measure 4e, Employee Rights Po	ints
	<u>ilable</u>
Meets Standard:	
• The school complied with all applicable laws, rules, regulations, provisions of its charter contract, and its	л
governing policies relating to employment considerations, including those relating to the Family Medical	4
Leave Act, the Americans with Disabilities Act, employment contracts, and employee termination.	
Approaches Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, provision of its charter contract,	
or its governing policies relating to employment considerations, including those relating to the Family	2
Medical Leave Act, the Americans with Disabilities Act, employment contracts, and employee termination	~
during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and	
regained compliance.	
Does Not Meet Standard:	
Does Not Meet Standard:	0
Does Not Meet Standard:	0

Section III, Indicator 5: School Environment

A safe and healthy school environment is critical to creating a conducive learning environment and protecting the wellbeing of students and employees.

eing of students and employees.	
Measure 5a, Facility	<u>Points</u>
Is the school complying with facilities requirements?	<u>Available</u>
 Meets Standard: The school complied with all applicable laws, rules, regulations, and provisions of its charter contract relating to the school's facilities including but not limited to: Fire inspections and related records; Viable certificate of occupancy; Documentation of requisite insurance coverage; Approval from GaDOE regarding initial site selection and facility requirements; and Subsequent approvals as necessary from GaDOE regarding facility maintenance, expansion, or other facility changes. 	4
 Approaches Standard: The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter contract relating to the school's facilities during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance. 	2
 Does Not Meet Standard: The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter contract relating to the school's facilities. 	0
Measure 5b, Health and Safety Is the school complying with health and safety requirements?	<u>Points</u> <u>Available</u>
 Meets Standard: The school complied with all applicable laws, rules, regulations, and provisions of its charter contract relating to safety and the protection of student and employee health, including, but not limited to: School Health Nurse Program; Conducting child abuse and neglect training; Annual health assessments of students; Diabetes Medical Management Plans; Access to auto-injectable epinephrine and automated external defibrillators as appropriate; Scoliosis screening; and A physically safe and secure environment. 	5
 Approaches Standard: The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter contract relating to safety and the protection of student and employee health during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance. 	3
 Does Not Meet Standard: The school failed to comply with at least one applicable law, rule, regulation, or provision of its charter contract relating to safety and the protection of student and employee health. 	0
Measure 5c, Information, Data, and Communication Is the school maintaining student and employee information and data securely and communicating with stakeholders appropriately?	<u>Points</u> <u>Available</u>
 Meets Standard: The school complied with all applicable laws, rules, regulations, provisions of its charter contract, governing board policies, and SCSC directives relating to providing required federal notices and the handling of information and stakeholder communication, including but not limited to: 	4

 Giving appropriate notices and maintaining the security of providing access to student 	
records under the Family Educational Rights and Privacy Act and other applicable	
authorities;	
 Transferring of student records; and 	
 Confidentiality of personnel records not subject to open records requirements. 	
Approaches Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, provision of its charter	
contract, governing board policy, or SCSC directive relating to providing required federal notices and the	2
handling of information and stakeholder communication during its SCSC onsite or desk monitoring visit,	
but the school adequately remedied its finding(s) and regained compliance.	
Does Not Meet Standard:	
• The school failed to comply with at least one applicable law, rule, regulation, provision of its charter	0
contract, governing board policy, or SCSC directive relating to providing required federal notices and the	0
handling of information and stakeholder communication.	
Total Points Available—Section III, Indicator 5: 13 points	
<u> </u>	

Section III, Indicator 6: Additional and Continuing Obligations

A charter school must faithfully fulfill all its obligations and quickly remedy any instance of noncompliance.

Measure 6a, Additional Obligations	Points
Is the school complying with all other obligations?	<u>Available</u>
 Meets Standard: The school complied with all other legal, statutory, regulatory, or contractual requirements, including those contained in its charter contract, that are not otherwise explicitly addressed in these Operational Performance Standards, including but not limited to requirements from the following sources: Revisions to state charter law; Consent decrees; Provisions of the National School Lunch Program, School Breakfast Program, and/or After-School Snack Program, including nutritional and reimbursement requirements thereof, if food service is provided; School bus specifications, bus driver training and licensing requirements, and transportation survey deadlines, if transportation is provided; Intervention requirements by the authorizer; and Requirements by other entities to which the charter school is accountable (e.g., Georgia Department of Education, Professional Standards Commission, Department of Labor, etc.) 	4
 Approaches Standard: The school failed to comply with at least one other legal, statutory, regulatory, or contractual requirement, including those contained in its charter contract that is not otherwise explicitly addressed in these Operational Performance Standards during its SCSC onsite or desk monitoring visit, but the school adequately remedied its finding(s) and regained compliance. 	2
 Does Not Meet Standard: The school failed to comply with at least one other legal, statutory, regulatory, or contractual requirement, including those contained in its charter contract that is not otherwise explicitly addressed in these Operational Performance Standards. 	0
Measure 6b, Continuing Obligations	<u>Points</u>
Is the school remedying noncompliance after proper notification?	<u>Available</u>
 Meets Standard: The school corrected noncompliance with legal, statutory, regulatory, contractual requirements, or SCSC directives after notification from the SCSC of noncompliance or the school has no matters of material noncompliance for which it received notification from the SCSC. 	6
 Does Not Meet Standard: The school failed to correct at least one matter of noncompliance with legal, statutory, regulatory, contractual requirements, or SCSC directives after notification from the SCSC of noncompliance. 	0

Total Points Available—Section III, Indicator 6: 10 points

SCSC Performance Framework

PR/Award # S282A220006

Section III: OVERALL DETERMINATION OF COMPLIANCE

As measured by the indicators and measures, is the school meeting operational performance standards?

SCORING CATEGORIES:

80-100 pts.	Meets Operational Performance Standards
70-79 pts.	Approaches Operational Performance Standards
0-69 pts.	Does Not Meet Operational Performance Standards

Appendix: Data Sources Compiled

Academic Performance:

Indicator	Data Source
1.	GaDOE: CCRPI Single Score, FTE System of Residency Report, Student Record
2.	GaDOE: CCRPI Content Mastery Sub-Score, FTE System of Residency Report, Student
	Record
3.	GaDOE: CCRPI Progress Sub-Score, FTE System of Residency Report, Student Record
4.	Ga:DOE: CCRPI Grade Band Score, FTE System of Residency Report, Student Record
5.	SCSC: Value-Added Impact Score
6.	GaDOE: Beating the Odds designation

Financial Performance:

Indicator		Data Source	
1.	Near-Term Measures	School Audit Report: Governmental Funds-Balance Sheet	
		School Audit Report: Statement of Revenues, Expenditures, and Changes in Fund Balance	
		SCSC Annual Enrollment Projection Form	
		GADOE: Data Collections, Student Enrollment by Grade Level	
		School Audit Report: Notes	
2.	Sustainability Measures	School Audit Report: Statement of Activities/Change in Net Position and Audit Notes	
		School Audit Report: Statement of Net Position	

Operational Performance:

Indicator		Data Source
1.	Educational Program	GaDOE: Charter School Annual Report, SEA Program Monitoring
	Compliance	SCSC: Monitoring Activities, Complaint Investigations
		Other: Reports of Noncompliance from a State or Federal Agency, Independent Audit
		Report
2.	Financial Oversight	GaDOE: Charter School Annual Report, SEA Program Monitoring, Financial Reports
		SCSC: Monitoring Activities, Complaint Investigations
		Other: Reports of Noncompliance from a State or Federal Agency, Independent Audit
		Report
3.	Governance	GaDOE: Charter School Annual Report, SEA Program Monitoring
		SCSC: Monitoring Activities, Complaint Investigations, Training Rosters
		Other: Reports of Noncompliance from a State or Federal Agency, Independent Audit
		Report
4.	Students and	GaDOE: Charter School Annual Report, SEA Program Monitoring, Data Reports
	Employees	SCSC: Monitoring Activities, Complaint Investigations,
		Other: Reports of Noncompliance from a State or Federal Agency, Independent Audit
		Report
5.	School Environment	GaDOE: Charter School Annual Report, SEA Program Monitoring, Data Reports
		SCSC: Monitoring Activities, Complaint Investigations, Training Rosters
		Other: Reports of Noncompliance from a State or Federal Agency, Independent Audit
		Report
6.	Additional and	GaDOE: Charter School Annual Report, SEA Program Monitoring
	Continuing Obligations	SCSC: Monitoring Activities, Complaint Investigations, Training Rosters
		Other: Reports of Noncompliance from a State or Federal Agency, Independent Audit
		Report

SCSC Expedited Review

- **Overview:** In addition to its annual cycle for new charter schools and charter school renewals, the State Charter Schools Commission of Georgia (SCSC) will conduct abbreviated reviews for existing charter schools. The established track records of existing charter schools in the areas of academic performance, financial management and operational compliance enable a more accelerated review than that which is required of a brand new charter petition. While the SCSC remains flexible in the timeline for reviewing petitions from existing schools, final action to approve or deny these petitions will occur as early as possible to allow sufficient time for the school to prepare operations in the event of approval by the SCSC.
- **Who:** Existing charter schools that meet SCSC standards as determined by the Comprehensive Performance Framework.
- **What:** For each school seeking approval via an expedited timeline, SCSC staff will review:
 - The existing school's original charter petition;
 - A Comprehensive Performance Framework overview that reviews the existing school's academic, financial, and operational performance;
 - An abbreviated version of the SCSC application that describes the application meets the needs of the proposed school's community and/or the state;
 - A proposed budget;
 - Past financial audits for the three preceding fiscal years;
 - Input from the existing school's current authorizer (if different from the SCSC); and
 - Publically available information regarding the existing school (e.g. news reports, public complaints, court documents).
- **How:** SCSC staff will review the school's proposal and collaborate with the petitioning group for additional information as necessary. Once the proposal has the potential for approval, SCSC staff will conduct an interview with the proposed school's governing board. SCSC staff will then formulate a recommendation to approve or deny each proposed school based on the application submitted by the proposed school's respective governing board, the information collected by SCSC staff, an interview with the proposed school's current authorizer (if different from the SCSC).
- When: The SCSC timeline for considering petitions is flexible depending on the needs of the petitioning group. However, an existing school should allot approximately three months to complete the application and review process. Accordingly, interested schools are encouraged to contact the SCSC as soon as possible to allow the school sufficient time to prepare operation for a new school year.
- **Next Steps:** Contact Morgan Felts (morgan.felts@scsc.georgia.gov) at the SCSC to receive a copy of the appropriate application.

State Charter Schools Commission of Georgia

Petition Evaluation Guide:

Rather than using a rubric or structured scoring system, the SCSC is interested reviewers' open and honest feedback based on their specialized expertise. The questions below are designed to help focus the inquiry but are not intended to limit review or feedback of the reviewer. Reviewers are encouraged to share all their comments and concerns.

This Evaluation Guide Contains Five (5) Sections:

- I. Academic Program
- II. School Governance
- III. Business Operations
- IV. Community Support and Need
- V. Overall Assessment

SECTION I: ACADEMIC PROGRAM

- 1. Does the proposed charter school present an academic curriculum that is aligned with the Georgia's identified academic standards?
- 2. Does the proposed charter school present an academic program (curriculum, learning model, etc.) that will enable the charter school to meet rigorous performance expectations?
- 3. Does the academic program of the proposed charter school utilize innovation and flexibility from state law that will enable the charter school to meet rigorous performance expectations?
- 4. Does the petitioner articulate a plan for identifying and addressing students' academic deficiencies and/or weaknesses so as to encourage constant student growth and achievement?
- 5. Is the academic program consistent with state and federal legal requirements, including those protecting students' rights, such as IDEA (special education) and programs for English language learners?
- 6. Is the mission of the proposed charter school consistent with the goal of providing students with better educational opportunities than they would otherwise be afforded at the traditional school to which they are zoned?

Overall, the ACADEMIC PROGRAM of the proposed charter school is:	Additional Comments, Concerns, or Overall Impressions:
Consistent with a high-quality charter school.	
Inconsistent with a high-quality charter school.	

SECTION II: SCHOOL GOVERNANCE

- 1. Does the petition clearly illustrate that school-level governance will be vested in the school's governing board (as opposed to the management organization or some other vendor, organization, or entity)?
- 2. Does the proposed governance board demonstrate the capacity to operate as a state charter school which requires an in-depth understanding of what it means to be a Local Education Agency (LEA)? (This includes, but is not limited to, full knowledge of charter school requirements, capabilities, and legal obligations.)
- 3. Does the governing board rely too heavily on or defer too often to an individual founding member, school leader, or EMO?
- 4. Does the governing board illustrate its ability to assess the performance and capacity of the school leader?
- 5. Does the governing board have a realistic plan to identify and recruit a qualified school leader and/or business operations manager?
- 6. Does the governing board have a plan for succession?

Overall, the SCHOOL GOVERNANCE of the proposed charter school is:	Additional Comments, Concerns, or Overall Impressions:
Consistent with a high-quality charter school.	
Inconsistent with a high-quality charter school.	

SECTION III: BUSINESS OPERATIONS

- Does the proposed charter school present a plan that will ensure the school will be fiscally sound? (Note: In order to be fiscally sound, the proposed budget must A) demonstrate a school's ability to use state allocated funds to implement the instructional and operational plan outlined within the petition, B) be based on a realistic student enrollment figure, and C) it must not be reliant on fundraising revenue and/or infusions of cash from vendors, grants, or external sources.)
- 2. Does the petitioner exhibit an understanding of school finance? (Knowledge of internal controls, appropriate debt ratios, governmental accounting, etc.?)
- 3. Do the proposed staff and governing board demonstrate the knowledge and capacity to make difficult financial decisions to operate a charter school, particularly as the school functioning as an LEA?
- 4. Does the school have a facility (or proposed facility) that is both reasonable and appropriate for the school?
- 5. Does the school rely too heavily on estimated or projected fundraising revenue, grant funds, or other fund sources external to state allocations to maintain a balanced budget?
- 6. Is the school partnering with an EMO or CMO, and, if so, is that partnership structured in a responsible manner?

Overall, the BUSINESS OPERATIONS of the proposed charter school is:	Additional Comments, Concerns, or Overall Impressions:
Consistent with a high-quality charter school.	
Inconsistent with a high-quality charter school.	

SECTION IV: COMMUNITY SUPPORT AND NEED

- 1. Did the petitioners establish a compelling need for the proposed school?
- 2. Will the proposed charter school meet the needs of its community?
- 3. Does the proposed school's attendance zone align with the proposed school's articulated mission and goals?
- 4. Has the petitioner provided evidence that the community will support the school with student enrollment?
- 5. Does the proposed charter school leverage community partnerships, including building relationships with other schools, universities, or nonprofit entities?

Overall, the COMMUNITY SUPPORT AND NEED of the proposed charter school is:	Additional Comments, Concerns, or Overall Impressions:
Consistent with a high-quality charter school.	
Inconsistent with a high-quality charter school.	

SECTION V: OVERALL ASSESSMENT

- 1. Is there an established need for the proposed school?
- 2. Will the proposed charter school meet the needs of all its students?
- 3. Will the proposed charter school be of the highest academic quality?
- 4. Will the proposed charter school provide a healthy learning environment and positive school climate?
- 5. Does the proposed school's governing board demonstrate the capacity to implement the plan outlined in the petition with fidelity?
- 6. Will the proposed charter school provide a better educational opportunity to students than they would otherwise receive at the traditional school they are zoned to attend?

Overall, I recommend that the SCSC:	
Authorize the proposed charter school based on its current petition.	
Authorize the proposed charter school if the charter school is able to clarify the aspects of its current petition as I have identified below.	
Authorize the proposed charter school if the charter school is able to take the actions detailed below, which are needed for a high-quality charter school.	
Decline to authorize the proposed charter school at this time.	

Addi	tional Co	omments,	, Concer	ns, or O	verall Im	pressions

Petition Review Process

State Charter Schools Commission of Georgia



Morgan Felts Chief Operations Officer

Kristen Easterbrook Charter Development Manager

Overview

- What to Expect
- Basics and Terminology
- Attendance Zone
- Local Board of Education Submission Requirements
- Submission to the SCSC
- Petition Contents
- SCSC Review
 - Legal Compliance Review
 - Substantive Review
 - Interview
 - Post-Interview Actions
 - SCSC Staff Recommendation
 - SCSC Vote

SCSC Mission

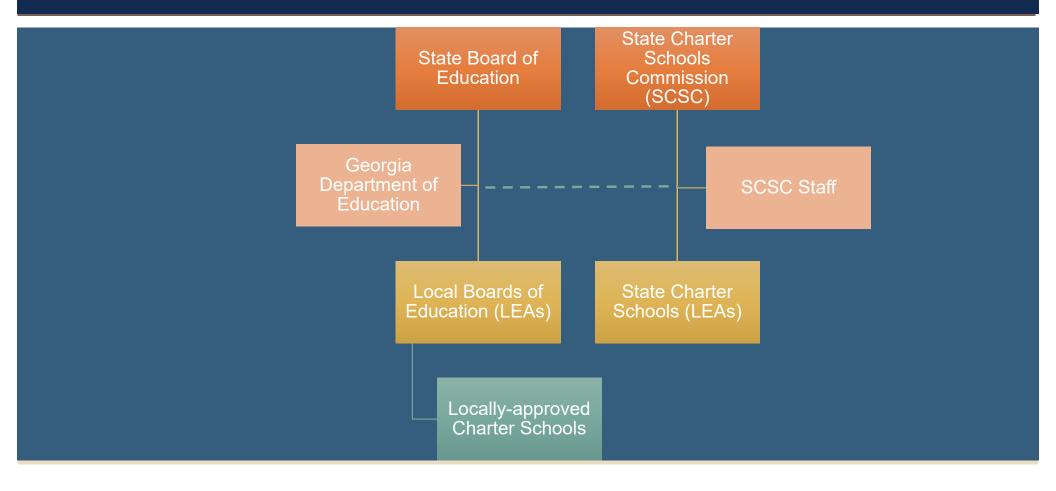
The mission of the State Charter Schools Commission of Georgia is to improve public education throughout the state by approving high quality charter schools that provide students with better educational opportunities than they would otherwise receive in traditional schools.

SCSC Petitioners Are Expected To...

Prepare for a time-consuming and stringent process;

- Demonstrate the capacity to build a start-up multi-million dollar business from scratch and have it ready to open in less than a year;
- Describe <u>how</u> the proposed school will provide a better educational option than what's already available in the selected attendance zone;
- Use the petition application and interview opportunity wisely to present a compelling case for the school's approval; and
- Prepare themselves for the real possibility of disappointment.

Basics and Terminology



Attendance Zone

Statewide Attendance Zone <u>OR</u> Defined Attendance Zone

The petition application and submission requirements depend on the school's identified attendance zone.

Attendance Zone

Understanding the difference between the two types of submission:

Submission for Informational Purposes <u>VS</u> Submission for Action

Schools with Statewide Attendance Zones

- A charter school that has a statewide attendance zone that is petitioning for authorization by the SCSC must submit its petition to the local board of education in which the school is proposed to be <u>located</u>.
- The submission of the charter petition to the local board of education is for informational purposes only.
- If the charter school will have a statewide attendance zone and only provides virtual instruction, the school does not need to submit a charter petition to a local board of education.

• O.C.G.A. § 20-2-2084

Schools with Defined Attendance Zones

A charter school that has a defined attendance zone must submit its **petition** to the local board of education in which the school is proposed to be <u>located</u> (for action) <u>and</u> to each local school system from which the proposed school plans to enroll students (for informational purposes).

The charter school must submit the petition to the local boards of education in accordance with the deadlines established by those local boards of education.

• O.C.G.A. § 20-2-2084

Schools with Defined Attendance Zones

- It is incumbent on the charter petitioner to identify the appropriate deadlines.
- Local Boards of Education (LBOE) may have deadlines to submit a Letter of Intent (LOI) as well as a petition.
- While LBOE deadlines vary, many LOIs must be submitted by February 1st.
- For schools authorized by the State Board of Education (i.e. locallyapproved schools) the school must submit an LOI to the Georgia Department of Education and LBOE by February 1st.
- Bottom Line Though the SCSC does not require an LOI, you must submit an LOI to the LBOE if required by the LBOE and you must submit an LOI to both the LBOE and GaDOE to be locally-approved.

Schools with Defined Attendance Zones

- When you submit a petition to the local board of education, you must do so in the application package (form) required by the local board of education.
- Often (but not always) the application package will be the same as the Georgia Department of Education.
 - http://www.gadoe.org/External-Affairs-and-Policy/Charter-Schools/Pages/Charter-Petition-Application.aspx
- The SCSC cannot act on a charter school petition until the local board of education in which the school is proposed to be located denies the petition or fails to approve or deny the petition within the time allotted by O.C.G.A. § 20-2-2064.

• O.C.G.A. § 20-2-2084

Attendance Zone

Statewide Attendance Zone - Bricks & Mortar

- Submit to the LBOE where the school will be located
- Informational Only
- No LBOE action required

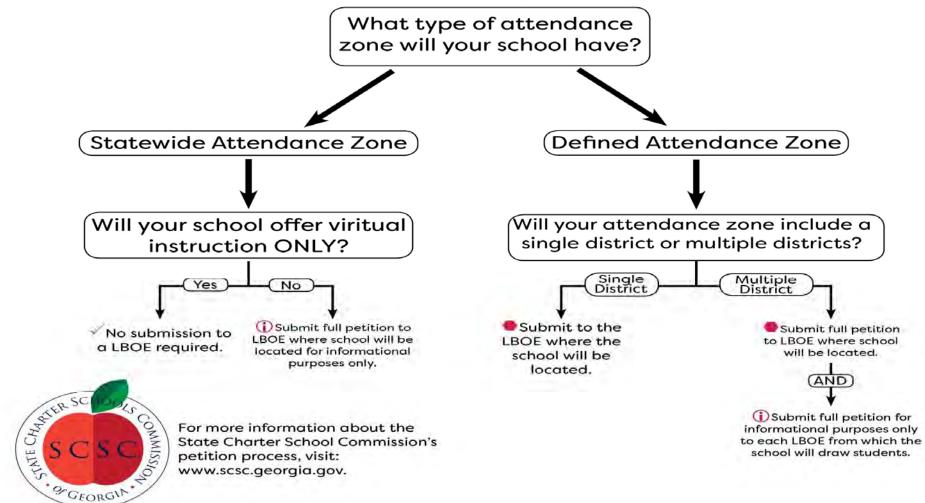
Statewide Attendance Zone – Virtual Only

- Do not need to submit to any LBOE
- No LBOE action required

Defined Attendance Zone

- Submit to LBOE where the school will be <u>located</u>
- <u>Also</u> submit to each local school system from which the proposed school plans to enroll students
- LBOE Action Required

Do I need to submit my petition to a Local Board of Education (LBOE)?



Quiz Yourself!

Scenario: Nice Charter School is a blended learning charter school with predominantly virtual instruction planning to locate and target students living in the Clayton County School District. However, in order to sustain high enrollment, the school would also like to enroll students from the surrounding districts of Henry County and Fulton County.

Questions to Answer:

- What are the possible attendance zone Nice Charter School could select?
- Based on each attendance zone, who should the school submit to?

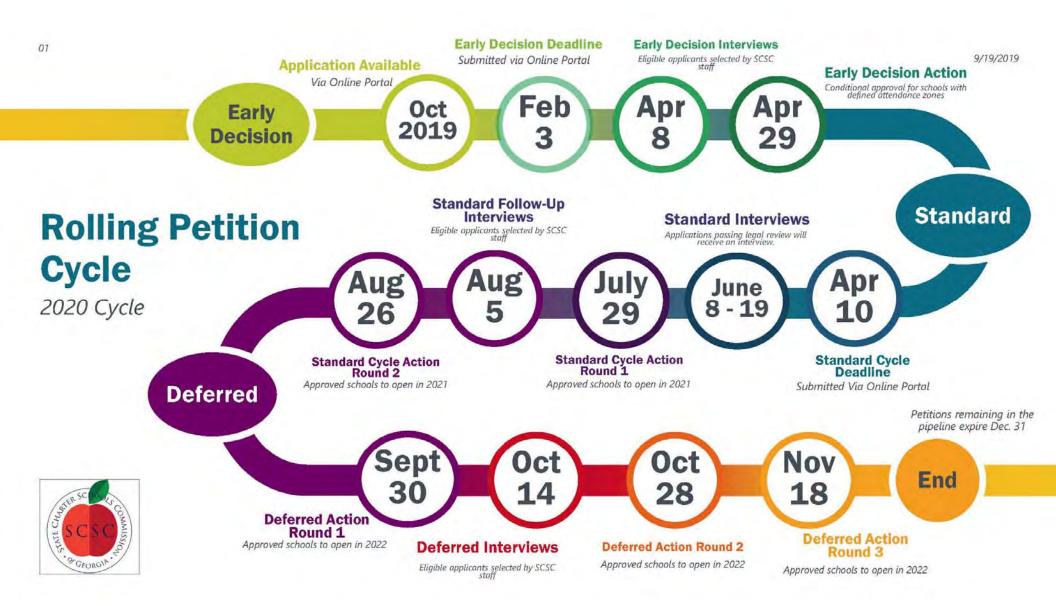
Submitting to the SCSC



Submitting to the SCSC

3 possible timelines/paths to approval

Early Decision	Standard	Deferred
 Applications	 Applications	 Applications
due: Feb. 3 Approval:	due: Apr. 10 Approval:	due: Apr. 10 Approval:
April Opening:	July/Aug Opening:	Sept/Oct/Nov Opening:
2021-2022	2021-2022	2022-2023



Submitting to the SCSC

If you submitted your petition to the LBOE and have yet to receive an approval or denial, and you wish to be considered by the SCSC, you should submit your petition to the SCSC by the SCSC deadline.

Part of the petition application requires you to acknowledge that you will notify the SCSC of the LBOE action regarding your petition.

If, at the time of the SCSC deadline, you have not submitted your petition to the LBOE – either because they did not have deadlines for doing so or you have a statewide attendance zone, you should submit the application to the LBOE at the same time or prior to submission to the SCSC.

The SCSC Application – Submitting Through FluidReview

- For the 2020 cycle, applications will be submitted using an online system - FluidReview.
- This system streamlines the process for both applicants and reviewers by standardizing application submission.
- Additionally, we hope it will help applicants avoid common errors with regard to submission.
 - Examples: use of the current petition/budget, signing assurances, format of budgets, skipping or not responding to narrative questions
- The SCSC will offer a webinar in October to help familiarize applicants with the FluidReview system, including any changes from 2019.

Petition Contents

- The petition submitted to the SCSC must be substantively the same as the petition submitted to the LBOE.
 - The form of the petition may differ and the petition to the SCSC should address the school's plan to operate as an LEA, but the substance of the petition, such as mission, organization, and governance should remain the same.
- The petition will consist of:
 - Narrative
 - Budget Template (SCSC FY 20 budget template)
 - Staffing Plan template
 - Required Appendices
 - Certificate of Incorporation
 - Board member resumes and conflict of interest forms
 - Agreements with EMO/CMOs

Introducing: the SCSC Early Feedback Program

- This program will continue for this cycle and will now also act as a screener for Early Decision applications.
- <u>Objective</u>: to make applicants aware of SCSC Petition and Interview expectations.
- What: applicants will have the opportunity to submit an early application for SCSC feedback. Those applicants electing to participate will also be eligible to participate in a mock interview.
- <u>When</u>: applicants must download and submit an enrollment form by January 17, 2020. More information and the form is available on the SCSC website.
- How: email a completed enrollment form (available on the SCSC website) to Kristen Easterbrook (kristen.easterbrook@scsc.georgia.gov).

Introducing: the SCSC Early Feedback Program

- Eligibility: to participate in the Early Feedback Program, applicants must:
 - Attend at least 1 SCSC Petitioner Bootcamp within the last 3 years;
 - Have an established governing board of at least 5 members; and
 - Must be an eligible applicant with a Georgia non-profit

Disclaimer: Participation in the SCSC Early Feedback Program is not required and will not guarantee a positive recommendation of your charter petition. Feedback from the program should not be construed to guarantee a specific recommendation of your application. Further, applicants should understand that early feedback will not be inclusive of all potential feedback they would receive following the formal submission of an application and the official petitioner interview.

SCSC Review

There are six stages of SCSC review:

- **1. Legal Compliance Review**
- **2.** Substantive Review
- **3.** Interview
- 4. Post-Interview Actions
- 5. SCSC Staff Recommendation
- 6. SCSC Vote

SCSC Review: Legal Compliance Review

- SCSC staff reviews each petition for its adherence to all state and federal laws applicable to the petition and the charter school.
- This includes laws related to the submission of the petition and laws related to the operation of school if opened.
 - Ex: local submission requirements and operation as a non-private, non-sectarian school
- SCSC staff will notify any petitioner of the legal deficiencies in the petition.
- The petitioner may remedy the identified legal deficiencies and submit a revised state charter school petition to the SCSC for review <u>in a</u> <u>subsequent petition cycle</u>.

SCSC Review: Substantive Review

SCSC staff conducts an in-depth evaluation of the charter school's mission, educational program, and proposed innovation as well as an examination of the charter school's business operations.

SCSC staff also evaluates the charter petition to ensure that it is consistent with state education goals, including enhancing public educational opportunities to meet the growing and diverse needs of students and to provide the highest academic quality to increase student achievement and positive outcomes.

Additionally, SCSC staff examines the charter school's proposed budget, funding sources, business partnerships, facilities, and any other operational aspect of the school.

SCSC Rule 691-2-.02

SCSC Review: Substantive Review

Examples of what the SCSC looks for:

- Does the proposed charter school present an academic program (curriculum, learning model, etc.) that will enable the charter school to meet rigorous performance expectations?
- Does the petitioner articulate a plan for addressing identified student weakness to encourage constant student growth and achievement?
- Does the proposed charter school present a plan that will ensure the school will be fiscally sound?
- Has the petitioner provided evidence that the community will support the school with student enrollment?
- Does the proposed charter school leverage partnerships, including building relationships with other schools, universities, or nonprofit entities?

SCSC Review: Substantive Review - Prior Applicants

New for 2020 If you've applied to the SCSC previously:

You must participate in the Early Feedback Program
 SCSC staff will specifically evaluate your submitted application for the changes you were notified needed to be made in your recommendation letter and Early Feedback summary.
 If SCSC staff does not see substantive changes to your application

in those areas, you will not be granted an interview.

SCSC Review: Interview

- SCSC staff will conduct interviews with the governing board and school leader of each charter school for which the legal compliance and substantive petition reviews did not reveal legal or significant deficiencies.
- The interview focuses on the governing board's capacity to operate a charter school in a manner that is:
 - 1. aligned with the SCSC's mission,
 - 2. consistent with state education goals, and
 - 3. fiscally responsible.

Each interview panel is comprised of SCSC staff, SCSC Commissioners, and 2-3 state and national experts with backgrounds in education, finance, and policy.

SCSC Review: Interviews and the Position of LBOE

As part of its review SCSC staff seeks feedback from the LBOE regarding each proposed state charter school. This is typically done when a school has passed both the legal and substantive review as part of the interview stage.

LBOEs are invited to express support or opposition of a proposed state charter school.

The LBOE may express its position in writing, by addressing the interview panel, or both.

SCSC Review: Post-Interview Actions

Following interviews SCSC staff may determine that additional information, documentation, or action by the petitioner is needed to clarify certain technical and/or non-substantive aspects of the charter school's petition or operations.

Examples:

- Please clarify the relationship between your school's governing board and the proposed charter school network.
- Please revise your proposed budget to reflect a recent reduction in state funding.

SCSC Rule 691-2-.02

SCSC Review: Post-Interview Actions

- If you are asked for clarifications or complete specific actions:
 SCSC staff will notify you in writing of what is needed.
 - You will be provided a deadline by which to provide the clarification or evidence that the requested action is complete.
 - It is highly unlikely that SCSC staff will extend deadlines.

If you decline to provide requested clarification or complete specific actions, your petition will be considered as it was originally submitted.

SCSC staff may request clarifications or actions as often as necessary to make a recommendation to the SCSC.

SCSC Review: SCSC Staff Recommendations

SCSC staff will recommend that the SCSC approve or deny each petition.

SCSC staff will base its recommendation on all available information regarding the charter petition including:

- The charter petition;
- The petition interview;
- Input from the LBOE;
- Supplemental information requested by SCSC Staff
- Information submitted by other stakeholders
- Publically available information that would affect the school (e.g. news reports, public complaints, court documents).

Petitioners may withdraw from the petition process at any time prior to SCSC action. Withdrawal means that there will not be further consideration of your petition this cycle.

SCSC Rule 691-2-.02

SCSC Review: SCSC Votes

- The SCSC will vote on SCSC staff recommendations to approve or deny each petition.
- The vote will occur at a public meeting in mid-to-late summer.
- Petitioners that are not approved are encouraged to revise the petition and reapply in the next petition cycle.
- The State Board of Education may overrule the approval of a school within 60 days of the SCSC decision.
- Absent SBOE action, an approved school will work closely with the SCSC, Georgia Department of Education, and other stakeholders to begin operation.

• O.C.G.A. § 20-2-2084

Post-Approval

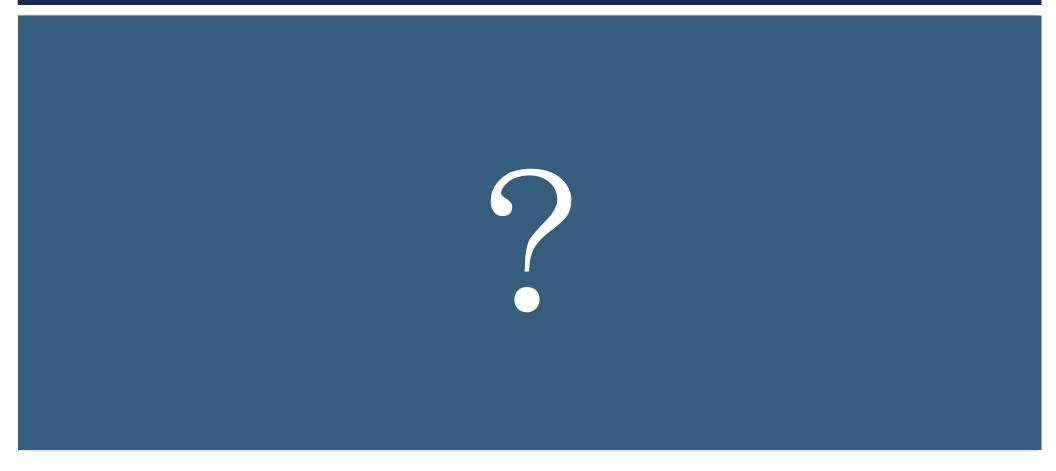
Once a state charter school is approved, governing board members must: • participate in a post-approval meeting with SCSC staff, • review SCSC guidance documents, • familiarize themselves with the SCSC's <u>Starting Strong</u> study, • attend a new school orientation with SCSC staff, and

✓ meet the requirements of the SCSC's pre-opening checklist.



- Follow LBOE submission procedures.
- Meet all local and state deadlines.
- Prepare for all authorizing avenues prepare to be a locally approved school and SCSC school.
- Be as complete and ready-to-open as possible.
- Use the petition and process as a demonstration of the school's potential.
- Treat the petition like a grant application you have one chance to prove your case that your school would be a needed high-quality charter.
- As an authorizer, the SCSC evaluates petition viability and school capacity. As such, the SCSC must:
 - Refrain from providing substantive information and support (We will help you understand the petition process, but we cannot provide advice as to the contents of the petition.)
 - Treat all petitioners equally.

Questions





CHARTER SCHOOL REPLICATION *and* CHARTER SCHOOL EXPANSION: Creating and Growing High Quality State Charter Schools

Section I: Definitions	
Charter School Replication	2
Charter School Expansion	3
Section II: Comparison Chart	
Replication vs Expansion	4
Section III: Example Scenarios	
Scenarios 1-4	6
Section IV: Evaluation Priorities for Replication and Expansion	8

SECTION I: DEFINITIONS

Charter school replication and charter school expansion are two separate processes that can be utilized by high performing charter schools to accomplish similar—but not identical—objectives. Depending on the goals the school(s) hope to accomplish, one process or another will prove most beneficial.

The definitions provided in this section delineate the differences between charter school replication and charter school expansion.

Charter School Replication				
Replication:	The creation of a second (or subsequent) charter school that utilizes the instructional program and/or academic model of an existing charter school.			
Replication and Charter Contracts:	All charter schools involved in a replication effort operate under separate charter contracts to ensure that accountability for performance takes place at the individual school/site level. In other words, in a replication scenario, the existing (or original) school operates under one charter contract while the second (or replicating) school operates under a separate charter contract.			
Replication and Board Governance:	 It is allowable for multiple schools to operate under a single board in a replication scenario (see guidance for "charter network" requirements) as long as each school in the network holds an individual charter contract. Example: If Cherokee Charter Academy (K-8) decided to create a "feeder pattern" of two elementary schools and two middle schools that fed into one high school—each of those schools could hold individual charter contracts and operate under the authority of a single governing board. 			
	 It is also allowable for multiple schools to operate under multiple boards in a replication scenario. In this instance, an existing school (and governing board) partner with a new/separate governing board with the intent of starting a new school that will eventually operate independently of the original school. Example: The board of Mountain Education Charter HS partnered with a new board (which would eventually become the Foothills Education Charter HS governing board) with the intent to create a new school serving a different region of the state that would eventually operate completely independently of MECHS. This partnership involved the development and execution of a detailed replication agreement between Mountain Education Charter HS and Foothills Education Charter HS which established A) the roles and responsibilities of both boards, B) the timeline by which Foothills would develop the capacity to operate independently of Mountain Education agreement with what would become the Coastal Plains Charter HS governing board.) 			

(cont'd on next page)

Charter School Expansion

Expansion	Growing an existing school by significantly increasing student enrollment, adding one or more grades, or adding an additional campus/site.
Expansion and Charter Contracts	Expansion does not result in the creation of a new charter school so no new/additional charter contract is required. Expansion (as the name implies) involves the horizontal or vertical growth of an existing school; thus—in typical circumstances—expansion is accomplished through the approval and execution of a charter amendment.
Expansion and Board Governance	 Expansion does not result in the creation of a new charter school so no separate/additional governing board is required. The addition of students/sites can be accomplished under the existing charter school board. Example: Pataula Charter Academy initially served grades K-8 but—over time—established the need for a high school. The school decided to expand (rather than replicate) by amending its existing charter contract to add the additional grade level offerings. Note: in this particular scenario, the school <u>could have</u> chosen to replicate rather than expand in order to keep the accountability for the K-8 school separate from the accountability for the high school.

• Example: Foothills Education Charter HS added three additional "instructional centers" to serve students in 2017. These additional sites A) allow the school to fulfill its commitment to serve a statewide attendance zone, and B) do not enroll enough students to constitute a stand-alone "school". As a result, the additional sites represent the school's *expansion* efforts and do not operate under individual charter contracts.

SECTION II: COMPARISON CHART

The following chart provides a side-by-side comparison of charter school *replication* versus charter school *expansion*.

	REPLICATION	EXPANSION
DEFINITION	Replication means <u>opening a new school</u> based on the educational model of an existing high-quality charter school.	Expansion means <u>growing an existing school</u> by significantly increasing student enrollment, adding one or more grades, or adding an additional site/campus to an existing high-quality charter school.
OVERALL RESULT	 Two (or more) Schools: 1) The existing high-quality charter school continues to operate; AND 2) A new school operates utilizing the model and practices of the existing school. 	One School : An existing high-quality charter school increases its offerings to students by adding grades, increasing student enrollment, adding a campus, or any combination thereof.
CHARTER CONTRACT	 Two (or more) Charter Contracts: The existing high-quality charter school continues to operate under its current charter contract; AND The new school is authorized under a separate charter contract that holds the new school accountable for its performance. 	One Charter Contract: Because the expansion of a high-quality charter school adds to the offerings of the existing school, no new charter contract is authorized, but the charter contract is amended to reflect the expanded offerings.
GOVERNING BOARD	One, Two, or More Boards: It is allowable for multiple schools to operate under a single board in a replication scenario (see guidance for " <u>charter network</u> " requirements) as long as each school in the network holds an individual charter contract. It is also allowable for multiple schools to operate under multiple boards in a replication scenario (see the replication agreement between Mountain Education Charter HS and Foothills Education Charter HS). In this instance, an existing school (and governing board) partners with a new/separate governing board with the intent of starting a new school that will eventually operate independently of the original school.	One Board: Because the expansion of a charter school does not result in a separate school, the governing board of the existing high-quality charter school continues to oversee the expanded offerings of the school.
SCHOOL ACCOUNTA- BILITY	Separate Accountability: Because the replication of an existing high-quality charter school results in the creation of a new school, the existing school and the new school will each be held accountable for their respective results. In other words, the existing charter school's CCRPI scores and SCSC Comprehensive Performance Framework results will be based on the performance of only the students and operations of the existing school. The new charter school will receive separate CCRPI scores and SCSC Comprehensive Performance Framework results based on the performance of only the students and operations of the new school.	Single Accountability: Because the expansion of a high-quality charter school does not result in the creation of a new school, the existing school will be held accountable for the results of the original operations and entire expanded offering. In other words, the charter school's performance of its added students, added grades, or additional campuses will result in only one CCRPI score and one set of SCSC Comprehensive Performance Framework results.

SCSC Guidance, Expansion and Replication - 4 PR/Award # S282A220006

EINANCIAL	Sonarata Einancial Accounting:	Single Einancial Accounting:
FINANCIAL ACCOUNTING	Separate Financial Accounting: Because the replication of an existing high-quality charter school results in the creation of a new school, the existing school and the new school must keep separate financial accounting systems. In other words, while the two schools may choose to share services or otherwise utilize their economies of scale, each school is required to track the specific use of its funding and the schools cannot comingle funding.	Single Financial Accounting: Because the expansion of a high-quality charter school does not result in the creation of a new school, the single school may choose to include the funding from its expansion in a single financial accounting system for both its original and expanded offering.
PROCESS	Charter Petition	Charter Amendment
PROCESS	 Charter Petition Because the replication of an existing high-quality charter school results in the creation of a new school with a new charter contract, replication can only occur through an authorizer's charter petition process. Applications for replicating a high-quality charter school are eligible for an expedited review that's separate from the SCSC's annual Petition Review Cycle for new petitioners. That stated, the extent to which an SCSC approval for a charter replication petition can be expedited depends on whether the petitioner's (or petitioners') identified attendance zone is "statewide" or "defined." If a replication petition contemplates the utilization of a statewide attendance zone, the expedited review of said petition can occur on a rolling basis (at any point throughout the year). 	Charter Amendment Because the expansion of a high-quality charter school does not result in the creation of a new school or a new charter contract, expansion can occur by amending the existing school's current charter contract. The SCSC's guidance for Amending Charter Contracts is available <u>here</u> .
	 If a petition contemplates the utilization of a defined attendance zone, the expedited review must take place in accordance with the review timeline of the local district in which the school plans to physically locate. (Current law requires petitions for new schools to be submitted and reviewed <u>concurrently</u> by the SCSC AND the local district.) 	
	Please visit our website for more information about the SCSC's <u>Expedited Review Process</u> . Regardless of when a charter petition for replication is submitted to the SCSC, a timeline of reviewing a petition for replication is generally shorter than for a new charter petition as the availability of performance data for an existing school allows the SCSC to make authorizing decisions based on a track record of performance rather than the likelihood of success based on the contents of a new charter petition.	

SECTION III: EXAMPLE SCENARIOS

Charter school replication and charter school expansion are two separate processes that can be utilized by high performing charter schools to accomplish similar—but not identical—objectives. Depending on the goals the school(s) hope to accomplish, one process or another will prove most beneficial.

The scenarios provided in this section illustrate the options available to petitioners considering replication and/or expansion.

Scenario 1

Details: Shiny Happy School is a high-quality K-12 school with a defined attendance zone of Stewart County. After documenting enrollment requests and parental inquiries over a period of time, the governing board of Shiny Happy School identified a need for high quality school choice in neighboring Muscogee County. After careful deliberation with input from a variety of stakeholders from both counties, the governing board and administration of Shiny Happy School would like to support the creation of a school choice option for Muscogee County, but they believe the students would be best served by a governing board more familiar with that particular community. Representatives of Shiny Happy School A) helped to assemble a governing board of community members from Muscogee County, B) mapped out a timeline for implementation in partnership with the new board, C) developed an agreement outlining roles and responsibilities of all parties (old board AND new board), and D) agreed to allow the administration of Shiny Happy People to mentor the administration of the Muscogee County location throughout the charter planning process and the first two years of operation in Muscogee.

Result: Shiny Happy School will **replicate in partnership with a new governing board.** Because the governing board of Shiny Happy School does not wish to have direct oversight of the Muscogee County location, the school must replicate in partnership with a Muscogee County governing board with the intent of forming a new and separate school that will eventually operate independently of Shiny Happy People. The new location, if approved, will receive a charter contract that is separate from the contract for Shiny Happy People and will be governed by the <u>new</u> Muscogee County governing board (with support from the governing board and administration from Shiny Happy People). The accountability for Shiny Happy School and the new Muscogee County school will be separate, and each school will be responsible for only the performance of its respective students.

Scenario 2

Details: Super Duper Charter is a high-quality middle school located in DeKalb County with a statewide attendance zone. The governing board of Super Duper Charter identified a community in Clayton County that would benefit from its program, and the community has indicated a clear desire to implement the model of Super Duper Charter. Initially, Super Duper Charter considered transporting students from Clayton County to DeKalb County; however, logistical obstacles related to the current facility and additional costs of transportation led the governing board of Super Duper Charter to decide to open another school in Clayton County. Because the new identified facility in Clayton County will be located relatively close to the current location in DeKalb, the governing board believes it can effectively oversee both locations.

Result: Super Duper Charter will **replicate under the existing governing board.** Because the governing board of Super Duper Charter would like to oversee both school locations, Super Duper Charter will replicate to create a second "sister" school. The governing board of the school will submit a replication application and is eligible for expedited review. While

both schools will operate under the authority of a single governing board, they will hold separate charter contracts, and accountability for performance will occur at the school level.

Scenario 3

Details: Gotham High is a high-quality high school that has a statewide attendance zone and wants to open another campus to serve middle school students. The governing board of the existing school desires to maintain oversight of the new campus, and they would like for the new campus to be located relatively close to the existing school. Given the school's successful performance in the high school grade band (arguably the toughest), the governing board believes it could incorporate middle grades into its existing charter contract without jeopardizing the school's overall accountability standing.

Result: Gotham High will **expand.** Because the governing board of Gotham High would like to add additional grade levels (and students), Gotham High can continue to operate as one school. While Gotham High <u>could also choose to replicate</u> and still maintain oversight through a single governing board, replication would result in the middle school campus of Gotham High operating as a second and separate school. As an expansion of Gotham High, the new campus will become part of the existing school with all students contributing to only one CCRPI score and SCSC Comprehensive Performance Framework results.

Scenario 4

Details: Monty Hall Academy is a high-quality K-12 charter that has an attendance zone of Rabun County. The governing board of Monty Hall Academy was approached by a community group in Lumpkin County wishing to bring the award-wining STEM program implemented by Monty Hall Academy to <u>only</u> students in Lumpkin County. The Lumpkin County community group would like to serve as the governing board for the new location. After many months of planning, the Lumpkin County community group and governing board of Monty Hall Academy developed a plan to open a location in Lumpkin County. Monty Hall Academy will provide the new location with professional development and curriculum development, but will not interact with the new location on a day-to-day basis.

Result: Monty Hall Academy will **replicate.** Monty Hall Academy and the Lumpkin County community group will petition for a new school with a defined attendance zone of Lumpkin County. Because state law requires charter school petitions seeking a defined attendance zone to first petition the local school district for approval, the charter petitioner must first submit a petition to Lumpkin County School District. The submission to Lumpkin County School District must adhere to the Lumpkin County School District charter petition process. If Lumpkin County School District, like most local school districts, require charter petitions to be submitted in accordance with a specified timeline with submission deadlines, Monty Hall Academy's charter petition for replication must adhere to those applicable deadlines. If approved, the new location will receive a charter contract that is separate from Monty Hall Academy and will be governed by the new governing board with operations that are distinct from Monty Hall Academy. The accountability for Monty Hall Academy and the new school will be independent and each school will be responsible for only the performance of its respective students.

SECTION IV: EVALUATION PRIORITIES FOR REPLICATION AND EXPANSION

ACHIEVEMENT TRACK RECORDS

Replication or expansion of a charter school is contingent on a proven track record of performance. **Specifically, the** school must meet academic, financial, and operational standards under the SCSC Comprehensive Performance Framework for no less that one full year before the SCSC will consider the school eligible for expansion or replication.

FINANCIAL SUSTAINABILITY

Operational models promoting financial sustainability are critical for charter school success. Schools or networks hoping to replicate or expand must demonstrate a track record of financial viability and independence as measured by the SCSC Comprehensive Performance Framework.

Additionally, financially viable schools do not rely on management organizations or other partners to cover budget shortfalls or provide loans, and they are able to feasibly extract themselves from any management contracts without threat of bankruptcy or closure.

Any evaluation of proposed replication and expansion will also include a review of a school's previous fundraising efforts.

Applicants must be prepared to submit unqualified audit reports devoid of significant findings, material weaknesses, and going concern disclosure for the last three fiscal years.

COMMUNITY ENGAGEMENT

Prior to replicating or expanding, there must be evidence of need as demonstrated by the local community that the school hopes to serve.

MOTIVES

There should be a clear, rational, and defensible reason for replication or expansion of the existing school.



Suspension/Closure Guide



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Overview

The suspension and/or closure of a charter school will be very difficult for school stakeholders, particularly students, families, and school staff. A charter school may close voluntarily, through non-renewal, or through termination. The decision of the State Charter Schools Commission (SCSC) to suspend, terminate or non-renew a state charter school is based on many factors, including the school's past performance in the areas of academic, operations and finance and the likelihood of future success. To protect the interest of students, the State Charter Schools Commission of Georgia may choose to temporarily suspend the operations of a state charter school while it considers termination of the charter contract. The SCSC is extremely cautious when making such a determination and is committed to helping students identify high-quality educational alternatives.

The primary purpose of this Guide, Checklist and Appendices is to provide schools with guidance on the orderly suspension or closure of statecharter school operations. SCSC staff is available to provide guidance and assistance to the state charter schools during the closure process. However, **the suspended/closing charter school is responsible for completing all actions in the Checklist**. The Appendices include sample notification documents to support efficient completion of Immediate Tasks. These documents include a Sample Parent Letter, Sample Staff Letter, Sample FAQS and a Sample Press Release. State charter schools are free to utilize the sample documents in the Appendices or may develop their own notification documents. As the school's suspension/closure will greatly impact all stakeholders, <u>school stakeholders must be notified within one week of a suspension/closure decision</u> to promote access to options aligned with their individual needs.

While the school is primarily responsible for protecting the best interests of displaced families and staff with a focus on securing successful transitions for students, the SCSC staff will work diligently to assist the transition. Additionally, as independent nonprofit corporations, charter schools must manage varying aspects of suspension/closure of the organization to adequately prepare for, and adhere to, legal and statutory requirements. As the school addresses the concerns of its many different stakeholders throughout the suspension/closure process, including school employees, building landlords, creditors, and – most importantly – the school must not lose its focus on ensuring that every student is placed in an appropriate school.

SCSC staff will work closely and meet regularly with school leadership and Board members to leverage resources and coordinate both academic and operational transition tasks. This collaboration will help ensure that student records are handled appropriately, families are educated about educational choices, and partnerships are forged with the local education community to facilitate student transfers.

Timing of Suspension/Closure Activities

Many of the tasks included in the Checklist are urgent and must take place within days of the decision to suspend/close the charter school. Other actions will be ongoing until full closure is reached or a suspension is lifted. This Checklist maps the timing of activities that range from actions taken immediately following a suspension/closure decision through final closure activities. The key categories of tasks are summarized below and fully detailed in the Checklist that follows.

- 1. Immediate Tasks Within 1 Week of the Suspension/Closure Decision:
 - Form a Transition Team of school staff and board members that is dedicated to ensuring the smooth transition of students and staff and suspending/concluding the school's business.
 - Clarify communication protocols and expectations.
 - Notify the school's community and general public of the school's suspension/closure.
 - Convene meetings with families and staff.
 - Engage key stakeholders, such as government entities and program partners.
 - Actively communicate with the SCSC staff member designated to serve as your liaison through the suspension/closure process.
- 2. **Pre-Closure Tasks –** <u>Within 3-5 Weeks of the Closure Decision</u>:
 - Notify the school's creditors.
 - Schedule receipts from the school's debtors.
 - Contact the school's contractors and vendors to conclude services.
- 3. **Ongoing Activities –** *Throughout the Completion of the Suspension/Closure Process*:
 - Provide support to students and families seeking placement options.
 - Facilitate the transfer of student records.
 - Ensure proper disposition of property and equipment.
 - Ensure appropriate use of dissolution funds.
- 4. Post-Closure Tasks <u>Up to 120 Days Following the Last Day of Instruction</u>:
 - Continue the transfer of student records.
 - Ensure proper storage and maintenance of staff and corporate records.
 - Finalize corporate financial affairs.
 - Return any final surplus of assets to the SCSC for transfer to the state treasury.

Suspension/Closure Checklist

Immediate Tasks: Within 1 Week of Suspension/Closure Decision

Notifications	Description	Completion Date	Status	SCSC Role
Students/Parents	Disseminate letter describing suspension/closure	Within 48 hours of		Share sample letter,
	decision, timeline for transition, contact	Decision		ensure notification
	information, and link to online information.			
Employees	Disseminate letter describing suspension/closure	Within 24 hours of		Share sample letter,
	decision, timeline for transition, contact	Decision		Ensure notification
	information, and link to online information.			
State & Local Agencies	Notify appropriate local districts that may receive	Within 72 hours of		Ensure notification
	students.	Decision		
General Public	Issue a press release that details history of the	Within 72 hours of		Share sample release,
	school, reason(s) for suspension/closure, outline of	Decision		Ensure notification
	supports, and contact information for those seeking			
	more information.			
Action Items	Description	Completion Date	Status	SCSC Role
Create FAQs	Answers basic questions regarding school	Within 24 hours of		Share sample
	suspension/closure, provides key information to	Decision		document with school
	support the transition of students and staff,			
	provides contact information.			
Establish Transition	Board Chair	Within 24 hours of		Share template with
Team/Contacts Points	Lead Administrator	Decision		school and obtain a
	Lead Finance Person			completed copy
	Parent/Student Liaison			
	Employee Liaison			
	Inventory/Facility Person			
	Each contact should include an email and phone			
	number.			
Secure Student Records	Ensure all student records are organized, up to date	Within 72 hours of		Confirm completion o
	and maintained in a secure location.	decision		task with school

Create Student Transition Plan	Should focus on enrolling students in a new, appropriate school. Should have clear deadline for key milestones. School should work with local districts and area charter schools to host a "school fair".	Within 1 week of decision	Obtain copy of plan
Secure Financial Records	 Ensure all financial records are organized, up to date and maintained in a secure location. A copy of the financial records should be provided to SCSC. Those records shall include all financial records of the school including, but not limited to: Original bank statements for no less than one year Payroll documentation Method by which tax documents will be provided to employees subsequent to school closure 	Within 1 week of decision	Obtain copy of records, review for completeness and potential issues
Convene Parent Meeting	 Review suspension/closure decision Make copies of FAQ document available Provide a calendar with important dates (school holidays, testing dates, transition timeline dates, end of school, etc.) Present transition plan Introduce and provide contact info for student/parent liaison 	Within 1 week of decision	Obtain copies of any materials distributed
Convene Faculty/Staff Meeting	 Review suspension/closure decision Affirm commitment to continue appropriate operations through closure Review transition plan for students Provide a calendar with important dates (school holidays, testing dates, transition timeline dates, end of school, etc.) Discuss compensation and benefits timeline 	Within 1 week of decision	Obtain copies of any materials distributed

General Task	Task relating to Finances
Task relating to Parents/Students	Task relating to Inventory/Faciliti
lask relating to Employees	rd # 5282A220006 Page e520

	 Introduce and provide contact info for faculty/staff liaison 			
Suspension/Closure Meeting 1	Description	Completion Date	Documents Required	
Meeting with SCSC to highlight progress	School transition team will meet with SCSC staff to confirm completion of all Immediate Actions, discuss next steps and any issues.	1 Week after Suspension/Closure Decision	 School should provide the following documents: Copies of notifications (students/parents, employees, state/local agencies, general public) Copy of FAQ document Transition team and contact information Student transition plan with milestones Financial records Parent contact information Faculty contact information Other materials distributed to student/parents and faculty/staff 	

Pre-Closure Tasks: Within 3-5 Weeks of the						
Suspension/Closure Decision						
Action Items Description Completion Date Status SCSC Role						

	General Task		Task relating to Finances		
	Task relating to Parents/Students				
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Parent/Guardian Transition	Distribute letter with detailed guidance	Within 4 weeks of		Obtain copy of
Letter	regarding transition plan. Letter should	Closure Decision		letter
	include, but not be limited to:	ut not be limited to: or at least one		
	Date of the last day of regular week in advance			
	instruction; of sus			
	Cancellation of any planned summer operations,			
	school;	whichever is		
	Notification of mandatory enrollment	sooner.		

General Task		Task relating to Finances
Task relating to Parents/Students		
Task relating to Employees	5282A2200 e e522	306

	 under Georgia law; Date(s) of any planned school choice fair(s); Listing of the contact and enrollment information for charter, parochial, public and private schools in the area; Information on obtaining student records before the end of classes; and, Contact information for Parent/Student Liaison 		
Staff/Faculty Transition Letter	 Outline transition plans and timelines for staff, including but not limited to: Commitment of school's board to transitioning staff; Commitment to positive transition for children into new educational settings; Any transition to new employment assistance board anticipates providing (such as job fairs); *Timelines for compensation and benefits; Timelines for outstanding professional development issues; COBRA information; Processing of year-end tax documents (W-2's, 1099's, etc.) Pertinent licensure information; and, Contact Information for Staff/Faculty Liaison 	Within 4 weeks of Closure Decision or at least one week in advance of suspending operations, whichever is sooner	Obtain copy of letter

General Task		Task relating to Finances
Task relating to Parents/Students		
Task relating to Employees		000
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	that may be owed to teachers based on their negotiated agreements with the school. For example, if payment for services rendered through the end of the school year are annualized over a 12-month period, the school may be required to pay funds budgeted for the summer after school closure.		
Notification of Agencies/Organizational Partners	 Notifications may include: GaDOE FBO GaDOE CSD GaDOE Assessment GaDOE Data Collections GaDOE Nutrition TRS LBOE and Districts SHBP 	Within 5 weeks of Closure Decision or at least one week in advance of suspending operations, whichever is sooner.	Obtain copies of notifications
List of Creditors/Debtors	 In order of priority of claim, formulate list of creditors and debtors and any amounts accrued and unpaid with respect to such creditor or debtor. The list should include: Contractors to whom the school owes payment; Lenders; Mortgage holders; Bond holders; Equipment suppliers; Secured and unsecured creditors; Persons or organizations who owe the school fees or credits; Lessees or sub-lessees of the school; and Any person or organization holding 	Within 5 weeks of Closure Decision and with updates, at minimum, the close of each month thereafter.	Obtain updated copy of list upon the close of each month until closure is complete.

General Task		Task relating to Finances
Task relating to Parents/Students		
Task relating to Employees		000
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	property of the school		
	Solicit from each creditor a final accounting of the school's accrued and unpaid debt. Compare the figures provided with the school's calculation of the debt and reconcile. Where possible, negotiate a settlement of debts consummated by a settlement agreement reflecting satisfaction and release of the existing obligations. Contact all debtors and demand payment. If		
	collection efforts are unsuccessful, consider turning the debt over to a commercial debt collection agency. All records regarding such collection or disputes by debtors regarding amounts owed must be retained.		
ESP Notification (if applicable)	 The school must: Notify management company/organization of termination of education program by the school's board, providing the last day of classes and absence of summer; Provide notice of non-renewal in accordance with management contract; Request final invoice and accounting to include accounting of retained school funds and grant fund status; Provide notice that the management company/organization should remove any property lent to the school after the end of classes; and, 	Within 5 weeks of Closure Decision.	Obtain copy of notification

General Task		Task relating to Finances
Task relating to Parents/Students		
Task relating to Employees		000
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	• Request a receipt of such property The trustees <u>should</u> convene a meeting to ensure that areas open to dispute and litigation (eg., intellectual property, disposition of assets, fees, claims, etc.) are discussed and addressed by counsel to the School and counsel to the management company.		
Contractors	 The school must formulate a list of all contractors with contracts in effect and: Notify them regarding school closure and cessation of operations; Instruct contractors to make arrangements to remove any contractor property from the school by a date certain (copying machines, water coolers, other rented property); Retain records of past contracts as proof of full payment; and, Maintain telephone, gas, electric, water, insurance, Directors and Officers liability insurance long enough to cover the time period required for all necessary closure procedures to be complete 	Within 6 weeks of Closure Decision.	Obtain copies of notifications.
IRS Status	 If the school has 501(c)(3) status, it must take steps to maintain that status including, but not limited to, the following: Notification to IRS regarding any address change of the school 	Within 6 weeks of Closure Decision.	Obtain copy of any notifications.

General Task		Task relating to Finances
Task relating to Parents/Students		
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	 corporation; and, Filing of required tax returns or reports (e.g., IRS form 990 and Schedule A) If the school corporation proceeds to dissolution, notify the IRS of the dissolution of the education corporation and its 501(c) status. 		
Employees and Benefit Providers	 The school should establish an employee termination date and: Notify all employees of termination of employment and/or contracts; Notify benefit providers of pending termination of all employees; Notify payroll processor of pending closure of the school; Notify employees and providers of termination of all benefit programs; and Terminate all programs as of the last date of service in accordance with applicable law and regulations (e.g., COBRA), including: health care/health insurance; dental plans; eyeglass plans; cafeteria plans; 401(k), retirement plans; and Specific rules and regulations may apply to such programs, especially teacher retirement plans. Therefore, legal counsel should be consulted. 	Within 6 weeks of Closure Decision.	Obtain copies of notifications and list of terminations including last date of service.
Vendors	The school must: • Create vendor list; and,	Within 6 weeks of Closure Decision.	Obtain copies of notifications

General Task		Task relating to Finances
Task relating to Parents/Students	<u></u>	Task relating to Inventory/Facilities
Task relating to Employees	5262A2200	000
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	Tasks, discuss next steps and any issues.		 coverage; Copies of all monthl with any edits or up and specified; Parent/Guardian tra Staff/Faculty transit 	y financial reports dates highlighted insition letter;
Meeting with SCSC to highlight progress	School transition team will meet with SCSC staff to confirm completion of all Pre-Closure	7 Weeks after Closure Decision	School should provide the fo • Verification of conti	-
Closure Meeting 2	Description	Completion Date	Documents Re	•
Disposition of Real Property	The School must develop a plan to disposes of any real property owned by the school.	Within 6 weeks of Closure Decision.		Obtain a copy of the plan.
Disposition of Assets Plan	The School must develop a plan for the disposition of all assets, property, and inventory, including assets purchased with federal funds. In closing out any federal grant and accounting for any federal grant funds, property owned by the federal government or property acquired under a federal grant must be distributed in accordance with federal regulations. See 34 CFR. Part 80, subparts C and D.	Within 6 weeks of Closure Decision.		Obtain a copy of the plan.
Inventory	 Notify vendors of closure and cancel or non-renew agreements as appropriate. The school must: Create a fixed asset list segregating state and federal dollars; Note source codes for funds and price for each purchase; and, Establish fair market value, initial and amortized for all fixed assets 	Within 6 weeks of Closure Decision.		Obtain inventory list. Random inventory check to ensure alignment.

	General Task		Task relating to Finances		
	Task relating to Parents/Students				
	Task relating to Employees		000		
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	 Copies of notifications to agencies and organizational partners; List of creditors and debtors; Notification to ESP (if applicable); Notifications to contractors; Any notifications to the IRS; Notifications to employee and benefit providers, including dates of last service; Notification to vendors; Inventory listing; Disposition of assets plan; and Disposition of real property plan.
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Action Items	Description	Completion Date	Status	SCSC Role
Continue Current Instruction	Continue instruction under current education program according to the charter contract until end of school year	School end date		Monitoring accordingly
Maintain Insurance	 Continue all appropriate insurance coverage, including: Insurance for the protection of assets Facility insurance Vehicle insurance Existing directors and officers liability insurance Employee health insurance and other insurance plans 	Finalization of closure		Receive verification of continuing coverage
Report on Financial Condition	School should submit the following to the SCSC on a monthly basis until finalization of closure:	Within 30 days of the closure decision and		SCSC should ensure the timely submission of all documents and

	General Task		Task relating to Finances		
	Task relating to Parents/Students	C000 A 0000	Task relating to Inventory/Facilities		
	Task relating to Employees		000		
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• A current balance sheet as of the month	ongoing by the close	review the documents
just ended before the closure decision,	of each month.	for potential issues
including accompanying schedules for: (1)		
All assets and their value; (2)		
Accounts/loans payable or other liabilities		
that exceed \$1,000;		
• A current income statement as of the		
month just ended before the closure		
decision		
• A grants report indicated the anticipated		
use of all funds received through federal		
and state grants, including a plan to return		
funds as appropriate for grant		
projects/programs that will be terminated		
or not completed. The school cannot use		
these funds for costs related to closure		
• A comprehensive month-to-month cash		
flow statement to operate the school		
through the closure date which accounts		
for the full disposition of assets and		
specifically gives priority to and includes:		
 Payment of instructional staff to 		
ensure completion of the school's		
instructional program (including an		
itemized schedule of current and		
projected payroll and payroll		
benefit payments, including payout		
of any accrued leave/vacation		
time);		
 Total funds to satisfy all 		
outstanding liabilities including but		
not limited to all contracts/leases		
and payoff of all debts;		

	General Task		Task relating to Finances	
	Task relating to Parents/Students	<u></u>	Task relating to Inventory/Facilities	
	Task relating to Employees		000	
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	 Payments to the Teachers Retirement System on behalf of employees; 	
	 Payment of any costs associated with transition of students and records; 	
	 Costs for a complete, close-out financial audit; and 	
	 All other costs associated with closure. 	
•	Monthly bank statements for each open account	

Action Items	Description	Completion Date	Status	SCSC Role
Final Report Cards and Student Records Notice	 The school must ensure that: All student records and report cards are complete and up to date; Parents/guardians are provided with copies of final report cards and notice of where student records will be sent with specific contact information); and, Parents/ guardians receive a reminder letter or post card reminding them of the opportunity to access student records under Freedom of Information law 	One week after the last day of instruction		Receive verification that this task was completed. Obtain copy of letter.
Transfer of Testing Materials	The school must follow Georgia regulations regarding disposition of Georgia assessment materials stored at the school and return as required.	One week after the last day of instruction		Verification from school and GaDOE Assessment division that this task was completed.

	General Task		Task relating to Finances	
	Task relating to Parents/Students	<u></u>	Task relating to Inventory/Facilities	
	Task relating to Employees		000	
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U.S. Dept. of Education Filings	File Federal form 269 or 269a if the school was receiving funds directly from the United States Department of Education. See 34 CFR 80.41.	One week after the last day of instruction	Obtain copies of filings.
Itemized Financials	 Review, prepare and make available: Fiscal year-end financial statements; Cash analysis; List of compiled bank statements for the year; List of investments; List of payables (and determinations of when a check used to pay the liability will clear the bank); List of all unused checks; List of petty cash; List of bank accounts; and, List of all payroll reports including taxes, retirement or adjustments on employee contracts Additionally, collect and void all unused checks as well as close accounts once transactions have cleared. 	Within one month of the last day of instruction	Obtain copies of itemized financials.
Payroll and Employment Verification Reports	 The school must generate a list of all payroll reports including taxes, retirement or adjustments on employee contracts as well as employment verification report to each employee. The school must provide evidence of having made payment and arrangements for the timely and complete processing of all payroll documentation (W-2's, 1099's, etc.). 	Within one month of the last day of instruction	

	General Task		Task relating to Finances		
	Task relating to Parents/Students	<u></u>	Task relating to Inventory/Facilities		
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	Evidence of each will consist of a size of		
	Evidence of such will consist of a signed		
	and dated assurance from the provider.		
	• The school must provide an employment		
	verification report to each employee at the		
	end of their employment which includes		
	the dates that the individual worked at the		
	school, the position(s) held (including grade		
	and subject taught if a teacher), and salary		
	history, signed by the School Leader		
Transfer of Student Records	The school must transfer all student records	Within one month of the	
	to students' new school and/or school	last day of instruction	
	district within which the charter is located.		
	Student records include:		
	 Grades and any evaluation; 		
	All materials associated with Individual		
	Education Plans;		
	• Immunization records; and,		
	 Parent/guardian information 		
	The school must contact the relevant districts of		
	residence for students and notify districts of		
	how (and when) records — including special		
	education records — will be transferred. In		
	addition, the school must create a master list of		
	all records to be transferred and state their		
	destination(s). This list should include:		
	 The number of general education records 		
	transferred;		
	The number of special education records		
	transferred;		
	The date of transfer;		
	 The signature and printed name of the 		
	charter school representative releasing		
	the records; and,		

	General Task		Task relating to Finances
	Task relating to Parents/Students	<u></u>	Task relating to Inventory/Facilities
	Task relating to Employees		000
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	 The signature and printed name of the district (or other entity) recipient(s) of the records 		
Expenditure Reporting	Ensure that Federal Expenditure Reports (FER) and the Annual Performance Report (APR) are completed.	Within 45 days of the last day of instruction	Obtain copies of reports.
Final Distribution of Assets	In general, all liabilities and obligations of the School must be paid and discharged to the extent of the School's assets. Any assets held subject to a lien, encumbrance, security interest or other written conditions or limitations must be disposed of in accordance with and subject to those conditions or limitations. Assets received and held by the School subject to limitations permitting their use only for charitable, benevolent, educational, or similar purposes, but not held upon condition requiring return or with specific disposition instructions, shall be held until dissolution and transferred or conveyed to one or more charter schools in the school district or to the school district. An itemized receipt must be obtained from each recipient of an asset containing the name, address and telephone number of the recipient. (In case of later question, audit or review by federal bankruptcy or state supreme court, or other governmental body.) In closing out any federal grant and accounting for any federal grant funds, property owned by the	Within 2 months of the last day of instruction	

<u> </u>	General Task		Task relating to Finances
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	federal government or property acquired under a federal grant must be distributed in accordance with federal regulations. See 34 CFR. Part 80, subparts C and D.		
Documenting the Disposition of and Transfer of Corporate Records	 The school's Board should follow its records retention policy, or follow guidance provided by SCSC. In all cases, the school board shall maintain all corporate records related to: Employees (background checks, personnel files); Loans, bonds, mortgages and other financing; Contracts; Leases; Assets and asset sales; Grants (records relating to federal grants must be kept in accordance with 34 CFR 8042.) Governance (minutes, by-laws, policies); Accounting/audit, taxes and tax status; Employee benefit programs and benefits; and, Any items provided for in the closure action plan 	Within 2 months of the last day of instruction	
Audit	The school must submit a final closeout audit which documents disposition of all liabilities. The school is encouraged to participate in the SCSC audit program to save costs.	Within 4 months of the last day of instruction or by October 1st	Obtain copy of final audit.

		General Task		Task relating to Finances
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Appendix A: Sample Notification Letter for Students

Dear Family of CHARTER SCHOOL NAME,

I want to thank you for entrusting your child's education to the staff and leadership of the CHARTER SCHOOL NAME and for believing in the mission of our school: [INSERT MISSION]. On behalf of the Board, leadership, and staff of the school, it has been our honor to serve the students of the CHARTER SCHOOL NAME for the past XX years. We have worked hard over the life of the charter to provide our students with the educational vision contained in our original charter application. As you may be aware, the State Charter Schools Commission of Georgia, which is charged by the state to oversee our school, voted to close CHARTER SCHOOL NAME at its DATE meeting. The Commission determined that the school did not meet its obligations of its charter contract and decided [NOT TO RENEW THE CONTRACT] OR [TO TERMINATE THE CURRENT CHARTER CONTRACT.] As a result, the last day of operationfor CHARTER SCHOOL NAME will be DATE.

[If applicable - The CHARTER SCHOOL NAME Board is committed to seeing this school year conclude successfully. We expect our students to engage in our academic program through the last day of our school's operation.] We will also be hosting a series of family meetings to assist students and families with the transition to their new school. These meetings will be attended by representatives from area schools; families will have the opportunity to learn more about educational options available to their children. Enrollment information and materials will also be available. The meetings will be held at the following dates and times:

- DAY, DATE, TIME, LOCATION 1
- DAY, DATE, TIME, LOCATION 2
- DAY, DATE, TIME, LOCATION 3

Please note that NAME is the point person for any questions that you might have, and s/he would be happy to meet with you to discuss this process. You may contact NAME via METHOD at INFORMATION. I again thank you for your faith in the CHARTER SCHOOL NAME, its leadership, teachers, and mission. [If applicable - Let's make the most of the next XX weeks that we have together, stay positive, and focus on giving our students all that we can to prepare them for long-term academic success.]

Respectfully,

Appendix B: Sample Notification Letter for Staff

Dear Staff of CHARTER SCHOOL NAME,

I want to thank you for your hard work and dedication this year on behalf of the children at the CHARTER SCHOOL NAME. Your professionalism is admirable and truly appreciated. We have worked hard over the past XX years to establish the school envisioned in our original charter application. Much of what we have accomplished is a credit to our teaching staff's dedication to the students we serve. As you may know, the State Charter Schools Commission voted on DATE to close our school. The Commission determined that the school did not meet its obligations of its charter contract and decided [NOT TO RENEW THE CONTRACT] OR [TO TERMINATE THE CURRENT CHARTER CONTRACT]. As a result, the last day of operation for CHARTER SCHOOL NAME will be DATE.

The CHARTER SCHOOL NAME Board is committed to seeing this school year through successfully. We expect our students to continue to receive a quality education through the very last day of school. We, in partnership with the staff at the State Charter Schools Commission are committed to helping the teaching staff fulfill their duties until the last day of school operation. Rest assured that the school is financially solvent, and that all employees – in accordance with their employment agreements – will continue to be paid through the end of the school year.

Please also be aware that our students and families are a top concern for CHARTER SCHOOL NAME. Therefore, we will be hosting a series of family meetings to assist students and families with the transition to new schools next year. These meetings will be held at the school at the following dates and times; all teaching staff are welcome to attend:

- DAY, DATE, TIME, LOCATION 1
- DAY, DATE, TIME, LOCATION 2
- DAY, DATE, TIME, LOCATION 3

NAME will be the point person for all staff questions related to the closure. You may contact NAME via METHOD at INFORMATION. [If applicable -While the day-to- day operations of the school won't change between now and the last day of school,] NAME will forward a timeline to the staff within the next XX days thatcontains information related to important dates, and the completion of operations [following the last day of classes on DATE]. I again thank you for your commitment and dedication to the children and community that we serve. [If applicable - Let's make the most of the next XX weeks that we have together, stay positive and focus on giving our students all that we can to prepare them for academic success after this year.]

Respectfully,

Appendix C: Sample FAQ Sheet for Parents and Staff

The following is a sample template for the parents and staff of a closing charter school. The goal of the template is to help the transition team prepare for the questions and concerns of parents, staff and other stakeholders. Schools are encouraged to modify the template as appropriate.

Q: When is the effective date of school closing?

A: CHARTER SCHOOL NAME will close on MONTH DAY, YEAR.

[If applicable] - Q: Will students remain enrolled for the rest of the term?

A: Yes. All classes will continue until the end of the term.

Q: Why is the school closing?

A: The schools authorizer, the State Charter Schools Commission of Georgia (SCSC), found that the school failed to meet its obligations under the SCSC Comprehensive Performance Framework (see: <u>http://scsc.georgia.gov/scsc-comprehensive-performance-framework</u>). Specifically, the school failed to meet (ACADEMIC, FINANCIAL, AND/OR ORGANIZATIONAL) performance goals.

[Alternatively, despite meeting performance standards of the SCSC, the board of CHARTER SCHOOL NAME decided not to continue their chartercontract because EXPLANATION OF CIRCUMSTANCE.]

Q: How do I obtain a copy of my student's records?

A: Parents can request student records from the CHARTER SCHOOL NAME office during normal business hours.

Q: How do I forward my child's records to his/her new school?

A: All student records will be automatically forwarded to the next school by CHARTER SCHOOL NAME. No action is required by parents. If the parent has not chosen a new school for their child, the student records will be sent to the district school associated with their address.

Q: Is there an appeals process to the school closing? Is it certain that the school will close?

A: Appeals channels have been considered by CHARTER SCHOOL NAME, and because of EXPLANATION OF CIRCUMSTANCE it is certain that the school will close on MONTH DAY, YEAR.

Q: Where will the students of CHARTER SCHOOL NAME be enrolled next?

A: If no action is taken by the parent, students will be enrolled in the district school associated with their address. Otherwise, parents may seek enrollment at other local charter schools, private schools, and magnet schools. Details can be found in the question below.

Q: Are there any alternative charter, private, or magnet schools in the region?

A: We will be hosting NUMBER enrollment fairs to help students find a new school location of their choice. The dates are scheduled for:

- DAY, DATE, TIME, LOCATION
- DAY, DATE, TIME, LOCATION
- DAY, DATE, TIME, LOCATION

Schools in attendance will be:

- DISTRICT NEIGHBORHOOD SCHOOL 1, address, phone, website
- DISTRICT NEIGHBORHOOD SCHOOL 2, address, phone, website
- CHARTER SCHOOL 1, address, phone, website
- CHARTER SCHOOL 2, address, phone, website
- PRIVATE SCHOOL 1, address, phone, website
- MAGNET SCHOOL 1, address, phone, website

Q: What is the situation of teachers at the school? Are they transferred to another district or are they fired when the school closes?

A: Teachers will be paid until the end of their teacher contracts on MONTH DAY, YEAR. The teachers at CHARTER SCHOOL NAME will have to find new teaching positions. CHARTER SCHOOL NAME will provide resume assistance and references to employees to ease their transition into new schools. A teacher job fair is scheduled for MONTH DAY, YEAR, to ensure the job security of teachers.

Q: I have additional questions. Who can I contact about my concerns and what is the callback policy?

A: CHARTER SCHOOL NAME can be reached at (XXX) XXX-XXXX, or by email at EMAIL. The transition manager, CHARTER STAFFMEMBER NAME, can be reached at (XXX) XXX-XXXX. Calls will be addressed within one business day.

Appendix D: Sample Press Release

Contact: NAME OF INFORMATION OFFICER, (XXX) XXX-XXXX

CHARTER SCHOOL NAME to Close DATE

Atlanta, Georgia. CHARTER SCHOOL NAME will close on DATE. The closure decision comes as a result of the school's review by the State Charter Schools Commission of Georgia. [Despite best efforts, the school was unable to attain the necessary academic and operational success to warrant renewal of CHARTER SCHOOL NAME's charter contract] or [Based on its review, the State Charter Schools Commission decided to terminate the School].

INSERT SCHOOL SPECIFIC INFO HERE. CHARTER SCHOOL NAME opened in XXX and serves DESCRIBE STUDENTS, COMMUNITY, ACADEMIC MODEL, ETC.

INSERT BRIEF DISCUSSION OF ISSUES HERE. CHARTER SCHOOL NAME suffered from DECLINING ENROLLMENT, LACK OF FINANCIAL RESOURCES, ETC.

CHARTER SCHOOL NAME will hold an information meeting for families on the following dates: DATE 1, DATE 2 and DATE 3. Families will be provided information on other public school choice options available to students and explain the transition of student records and other pertinent information at that time.

160-4-9-.06 CHARTER AUTHORIZERS, FINANCING, MANAGEMENT, AND GOVERNANCE TRAINING.

(1) RESPONSIBILITIES OF CHARTER AUTHORIZERS.

(a) RESPONSIBILITIES OF LOCAL BOARDS OF EDUCATION. Local boards of education ("local boards") shall provide control and management of local charter schools and charter systems, pursuant to O.C.G.A. § 20-2-2065(b)(2) and State Board of Education Rule 160-4-9-.06.

1. This control and management shall include the following responsibilities for local charter schools:

(i) Pre-Charter award or charter renewal:

(I) Review and act on local charter school petitions;

(ii) Post-Charter award or charter renewal:

(I) Monitor a new local charter school's pre-operational period for timely implementation of ready-to-open benchmarks related to facilities, school personnel, enrollment procedures, curriculum and instruction, operations and fiscal management, and governance. In the event the charter school governing board does not meet the ready-to-open benchmarks, the local board may postpone the school's opening by up to one year. An assurance to the Department by the local district of a new school having achieved ready-to-open status is required before the new school may open.

(II) Enforce clear expectations for, and ensure achievement of, performance goals set forth in the charters;

(III) Ensure that local charter schools are fiscally sound and operating in accordance with Generally Accepted Government Auditing Standards, including annually reviewing budgets and reviewing working papers as needed;

(IV) Ensure that charter schools comply with Governmental Accounting Standards Board (GASB) Statements and Interpretations, which constitute Generally Accepted Accounting Principles (GAAP) for financial reporting.

(V) Ensure that local charter schools submit required financial information in accordance with the policies and deadlines established by the local school system for inclusion in the system's annual Financial Review Report (DE046) to the Georgia Department of Education;

(VI) Ensure that local charter schools comply with the accountability provision of O.C.G.A. § 20-14-30 *et seq.* and federal accountability requirements;

(VII) Evaluate a local charter school's performance annually in relation to the expectations and goals set forth in the charter using the Department's Performance Framework or an alternate approach approved by the Department and take appropriate action based on this evaluation;

(VIII) Coordinate with the State Board of Education and the Department in monitoring and supporting any local charter schools identified as turnaround eligible schools pursuant to O.C.G.A. § 20-14-45.

(IX) Develop termination processes that:

I. Provide the charter school governing board with timely notification of the prospect of and reasons for termination of a charter;

II. Allow the charter school governing board a reasonable amount of time to prepare a response;

III. Allow for a public hearing;

IV. Require the local school system to submit documentation and to produce witnesses at the public hearing who can testify to the reasons for termination;

V. Provide the charter school governing board with an opportunity to submit documents, produce witnesses, and give testimony challenging the reasons given for termination and to argue for continuation of the charter at a public meeting held for that purpose;

VI. Allow the charter school governing board to be represented by its own counsel, to call witnesses on its behalf, and to confront witnesses, and challenge documents, statements or reports against continuation of the charter;

VII. After a reasonable period for deliberation, require a final determination to be made and conveyed in writing to the charter school governing board and the State Board of Education. Such final determination must clearly articulate the reasons for the final decision;

VIII. Ensure the charter school maintains custody of active student records if the school's charter authorization is terminated by the local board of education and transferred to the State Charter Schools Commission pursuant to O.C.G.A. § 20-2-2063.3.

(IX) Allow local charter schools to exercise substantial autonomy over decisions affecting the school. The nonprofit governing board of a charter school shall have authority to make personnel decisions, including selection of the principal or school

leader; financial decisions and resource allocation decisions, including establishing the number and type of personnel, curriculum costs, supply costs, equipment costs and maintenance and operations costs; selection of a curriculum and accompanying instructional materials; establishment and monitoring of the achievement of school improvement goals, including approval of the school improvement plan and oversight of its implementation; and operations that are consistent with school improvement goals. The local board shall only override decisions of a conversion charter school's governing board in those areas where the local board has constitutional authority and has a reasonable belief that a decision will be substantially detrimental to students;

(X) Allow a charter school that has passed the Department of Education facility inspection and holds a valid certificate of occupancy to occupy its building and ensure that no other licensure to operate the school, including, but not limited to, a business license, professional license, or occupational tax certificate is required; provided, however, that any for profit vendor of the charter school shall be subject to any applicable local requirements relating to doing business in this state. Charter schools shall be subject to all applicable zoning, planning, and building permitting requirements when constructing or renovating a facility;

(XI) Provide to the charter school, for inclusion in the locally approved charter petition, the base per-pupil amount that it will receive upon execution of the contract as long as the school system receives state and local revenues upon which the approved school budget is based;

(XII) Distribute applicable federal, state, and local funding to local charter schools in a timely manner and in accordance with law; ensure that funds are spent according to applicable laws, rules, policies, and guidelines, including requirements for monitoring the use of federal funds;

(XIII) Ensure that the requirements of the Individuals with Disabilities Education Act (IDEA) are met. The local board(s) must have a plan to ensure that the local school system shall:

I. Serve students with disabilities attending the local charter school in the same manner as it serves all other students with disabilities in its other local schools. Nothing in this section shall prevent a local board(s) from providing services to students with disabilities at a central location, if that is standard practice for students with disabilities from other schools in the local school system.

II. Provide funds to local charter schools on the same basis as it provides funds to its other local schools, including proportional distribution based on relative enrollment of children with disabilities.

III. Ensure that individuals employed as special education teachers in local charter schools have a bachelor's degree and are either certified in special education or hold a special education license.

IV. Ensure that the requirements of all other applicable federal laws are met.

(XIV) Develop policies to provide for an expedited review process for high quality charter school renewal, expansion, and replication; and

(XV) Publish annually the name and address of each unused facility located in the school district that it governs.

2. At a minimum, this control and management shall include the following responsibilities for charter systems:

(i) Pre-Charter:

(I) Review and act on charter system petitions;

(ii) Post-Charter:

(I) Enforce clear expectations for, and ensure achievement of, performance goals set forth in the charter;

(II) Ensure that all system charter schools comply with the accountability provision of O.C.G.A. § 20-14-30 *et seq.* and federal accountability requirements;

(III) Allow system charter schools to exercise school level governance over decisions affecting the school, as provided for in the contract. A Local School Governing Team at system charter school shall have authority to make personnel decisions, including recommending the principal or school leader for selection by the local board of education; financial decisions and resource allocation decisions, including having input into the final recommendations for a system charter school's budget and input as to the number and type of personnel, curriculum costs, supply costs, equipment costs and maintenance and operations costs; input into the selection of a curriculum and accompanying instructional materials; establishment and monitoring of the achievement of school improvement goals, including approval of the school improvement plan and oversight of its implementation; and school operations decisions, including input into any school operations that are consistent with school improvement and charter goals. The local board of education ultimately retains constitutional authority;

(IV) Distribute applicable federal, state, and local funding to system charter schools in a timely manner and in accordance with law; ensure that funds are spent according to applicable laws, rules, policies, and guidelines, including requirements for monitoring the use of federal funds;

(V) Ensure that the requirements of the Individuals with Disabilities Education Act (IDEA) are met and that individuals employed as special education teachers in system

charter schools have a bachelor's degree and are either certified in special education or hold a special education license; and

(VI) Ensure that the requirements of all other applicable federal laws are met.

3. ANNUAL REPORTING

(i) Each authorizer that oversees a local charter school or has received a charter petition shall submit to the State Board of Education and post on its website an annual report including the following:

(I) The authorizer's strategic vision for chartering and progress towards achieving that vision.

(II) The academic performance of all operating public charter schools overseen by the authorizer, according to the performance expectations set forth in the charter, for inclusion in the annual report to the General Assembly pursuant to O.C.G.A. § 20-2-2070.

(III) The financial performance of all operating public charter schools overseen by the authorizer, according to the performance expectations set forth in the charter, for inclusion in the annual report to the General Assembly pursuant to O.C.G.A. § 20-2-2070.

(IV) The status of all public charter school applications, including applications (A) pending review; (B) approved, and, for each, the date on which the school will open or did open; and (C) denied, and, for each, the reasons for the denial.

(V) All public charter schools that have closed within the past year, and, for each, the reason for closure.

(VI) The authorizing functions provided by the authorizer to the public charter schools under its purview, including the authorizer's itemized operating costs and expenses associated with providing its authorizer functions.

(ii) Each authorizer that provides oversight of a charter school shall include in its annual report a written confirmation that it has not in the preceding year required a commercial contract with any public charter school board under its oversight.

(b) RESPONSIBILITIES OF THE STATE BOARD OF EDUCATION. The State Board of Education shall have the following supervisory duties pursuant to O.C.G.A. § 20-2-2063:

1. Review and act on local charter school petitions and charter system petitions;

2. Review State Charter Schools Commission decisions in accordance with

O.C.G.A. § 20-2-2083(a)(1) and take action, as appropriate;

3. Ensure the provision of technical assistance to local school systems in successfully administering their responsibilities as described in (1) above;

4. Ensure that each charter school uses the Department's template to submit an annual report that outlines the previous year's progress no later than November 1 of each year. The report shall contain, but is not limited to:

(i) An indication of progress toward the goals as included in the charter;

(ii) Academic data for the previous year, including state academic accountability data, such as standardized test scores and other such progress data;

(iii) Updated contact information for the governing board and the administrator;

(iv) Audit report or unaudited financial statements;

(v) Proof of current Georgia nonprofit status;

(vi) Proof of compliance with State Board of Education Governing Board training requirements for Charter Schools as outlined in State Board of Education Rule 160-4-9-.06 and in Part 4 below.

(vii) Any other supplemental information that the charter school chooses to include or that the state board requests, that demonstrates that school's success.

5. Ensure that the Department monitors charter schools and charter systems in the second and fourth year of the charter term.

(i) For purposes of this section, monitoring may include an on-site visit, a telephone audit, or a desk audit.

(ii) Based on its findings and/or observations, the Department may place the school or system on probation in accordance with Part 3 below or provide feedback, as needed.

6. Ensure that each charter system submits an annual report outlining the previous year's progress no later than November 1 of each year. The report shall contain, but is not limited to:

(i) An indication of progress toward the goals as included in the charter;

(ii) Academic data for the previous year, including state academic accountability data, such as standardized test scores and other such progress data;

(iii) Updated contact information for the system, including the name and contact information of an employee of the charter system that can facilitate communications between the Charter Schools Division and the chairpersons of the Local School Governing Teams.

(iv) Proof of compliance with State Board of Education Governing Board training requirements for Charter Systems as outlined in State Board of Education rule 160-4-9-.07;

(v) A description of the actual authority exercised by Local School Governance Teams with regard to each component of school level governance;

(vi) A description of any plans to increase school level governance in the future;

(vii) An itemization of initiatives being supported by the added QBE dollars for charter systems and a description of how those funds have promoted school level governance or improved student achievement; and

(viii) Any other supplemental information that the charter system chooses to include or that the state board requests, that demonstrates that system's success.

7. Ensure the provision of technical assistance to petitioners submitting planning, implementation, facilities grants, new and renewal charter petitions, petition renewal applications, and any other programs authorized by applicable law.

8. Create and maintain a strategic plan and policy for the state's charter schools program.

9. Ensure that the Department manages any applicable federal grant awarded to the state for use by the state's charter schools.

10. Ensure that the Department annually evaluates charter schools and charter systems using a Performance Framework for assessing academic, financial, and operational performance at the school and system-level.

11. Jointly establish with the State Charter Schools Commission a code of principles and standards of charter school authorizing to guide local boards of education, the State Board, and the State Charter Schools Commission in meeting high-quality authorizing practices pursuant to O.C.G.A. § 20-2-2063.3. The State Board of Education shall provide for or approve training for its staff and local board of education members on this code of principles and standards of charter school authorizers.

12. Provide for the annual review of local boards of education by an independent party for adherence to the principles and standards of charter school authorizing practices adopted by the State Board of Education pursuant to O.C.G.A. § 20-2-

2063.3. This review shall detail the participation of the local board of education in training on the principles and standards of charter school authorizers.

13. Ensure that the Department annually assigns authorizers to one of four categories, and that the Department develops definitions for the categories (first time authorizer, exemplary authorizer, adequate authorizer, and authorizer needs improvement).

14. Ensure that the Department provides focused technical assistance to those authorizers not in the exemplary category, including, but not limited to, assistance in the review of decisions made by those authorizers in their oversight of local charter schools and charter systems such as charter petition denials, non-renewals, and terminations.

15. Provide an annual report on the status of the state's charter school program to the General Assembly, pursuant to O.C.G.A. § 20-2-2070.

(2) CHARTER SCHOOL OPERATIONS

(a) CHARTER SCHOOL EMPLOYMENT. For start-up charter schools, teachers and other instructional staff and faculty must be employees of the Governing Board and may not be employed by an Educational Service Provider or other entity affiliated with an Educational Service Provider. The individual with the highest authority in school administration may be employed by an Educational Service Provider only if the Governing Board retains the authority to select and dismiss that individual from service at the charter school. For start-up and conversion charter schools, non-instructional staff, such as the Chief Financial Officer, business manager, bookkeeper, or maintenance personnel, may be employed by entities other than the Governing Board; however, the Governing Board shall remain responsible and accountable for all operations, compliance, and performance of any and all selected contractors.

(b) CHARTER SCHOOL OPENING. A new local charter school must timely implement all of ready-to-open benchmarks related to facilities, school personnel, enrollment procedures, curriculum and instruction, operations and fiscal management, and governance before it will be permitted to open. In the event the charter school governing board does not meet the ready-to-open benchmarks, the local board may postpone the school's opening by up to one year. An assurance to the Department by the local district of a new school having achieved ready-to-open status is required before the new school may open.

(c) CHARTER SCHOOL FACILITY EXPANSION. A charter school shall not add or expand facilities during the term of its charter contract without prior written approval from the Georgia Department of Education. A charter school adding or expanding facilities during its charter term shall adhere to all facility site and building approval requirements. Charter schools utilizing multiple sites or facilities must comply with all open enrollment requirements provided in rule and law.

(d) CHARTER SCHOOL TEACHER/LEADER EVALUATIONS. All charter schools shall utilize the performance evaluation system adopted by the State Board pursuant to O.C.G.A. § 20-2-210. Each charter school shall employ at least two individuals credentialed to administer the teacher evaluation system. Each charter school shall employ or have on its governing board at least two individuals credentialed to administer the leader evaluation system. An individual becomes credentialed in the performance evaluation system by successfully completing the training provided by the Georgia Department of Education. No charter school may delegate the evaluation of its school leader or other employees to any individual or entity that is not employed by the charter school or is a member of its governing board.

1. Charter schools shall have the flexibility to implement a tiered teacher evaluation system and to define the measures needed to fulfill the requirements of the teacher and leader evaluations pursuant to State Board rule 160-5-1-.37 and O.C.G.A § 20-2-210, including:

(i) For teachers of record who teach courses that are subject to annual state assessments aligned with state standards, define any additional professional growth measures beyond measurements based on multiple student growth indicators, evaluations and observations, and standards of practice that shall count for 20 percent of the evaluation.

(ii) For teachers of record who teach courses that are not subject to annual state assessments aligned with state standards, define any:

(I) Student growth indicators, including the school or local school system total score on the annual state assessments that shall count for 30 percent of the evaluation; and

(II) Additional professional growth measures beyond measurements based on multiple student growth indicators, evaluations and observations, and standards of practice that shall count for 20 percent of the evaluation.

(iii) For principals and assistant principals, define the combination of achievement gap closure, Beat the Odds, and College and Career Readiness Performance Index data that shall count for 20 percent of the evaluation; and

(iv) Implement a tiered evaluation system, in which reduced observations of certain teachers of record may be conducted to provide additional time for evaluators to coach and mentor new teachers and teachers with a performance rating of 'Needs Development' or 'Ineffective' pursuant to paragraph (4) of O.C.G.A § 20-2-210.

(e) CHARTER SCHOOL PUBLIC RECORDS. Charter school governing boards

shall maintain its adopted policies, budgets, meeting schedule, meeting agendas, and meeting minutes, and shall make such documents available for public inspection pursuant to the Georgia Open Records Act, O.C.G.A. § 50-18-70 *et seq*. A charter school shall utilize an online school website and ensure that the following information, at a minimum, is available on the website:

1. Governing Board membership.

2. Governing Board and committee meeting calendar.

3. Meeting agendas for upcoming Governing Board and committee meetings.

4. Meeting minutes for past Governing Board and committee meetings unless the Georgia Open Meetings Act, O.C.G.A. § 50-14-1, limits their publication. Minutes shall be available on the charter school's website within ten (10) business days after Governing Board approval and for the duration of the charter.

5. Procedure for contacting the charter school's Governing Board and most senior school administrator.

6. Any admissions application utilized by the charter school and notification of enrollment and admissions procedures, including the date, time, and location of any upcoming enrollment lottery.

7. A summary or line item version of the proposed and adopted annual operating budget pursuant to O.C.G.A. § 20-2-167.1.

8. The school's monthly financial statements.

9. A link to the school's financial efficiency ratings published by and found on the Governor's Office of Student Achievement's website, and a link to the local school system's financial information published by and found on the Department's website in accordance with O.C.G.A. § 20-14-46(d).

10. The school's Charter Contract.

(3) CHARTER SCHOOL FUNDING

(a) CHARTER SCHOOL FUNDING CALCULATIONS. Charter school funding calculations shall be pursuant to the following:

1. A local charter school shall be eligible for federal, state, and local funds pursuant to O.C.G.A. § 20-2-2068.1 and § 20-2-2090, as appropriate.

2. For the purpose of local charter schools, the Department shall determine the

allotment of state funds and federal funds for the LEA in which the charter school is physically located, pursuant to O.C.G.A. § 20-2-2068.1, or to the local board(s) stipulated as the fiscal agent in the charter. For state charter schools, the school shall serve as its own fiscal agent.

3. Pursuant to O.C.G.A. § 20-2-2068.1(a) the local board(s) and the State Board of Education shall treat a local charter school no less favorably than other local schools located within the applicable local system unless otherwise provided by law, including with respect to the provision of funds for instruction, school administration, transportation, food services and where feasible, building programs. Funds for transportation and food service shall be provided in accordance with the Local Units of Administration (LUA) Manual. A local charter school may request the Department to order mediation if it believes the local board(s) is treating the charter school less favorably than other local schools.

4. Pursuant to O.C.G.A. § 20-2-2068.1(c), the local board(s) shall calculate and distribute the funding for the start-up charter school on the basis of its actual or projected enrollment in the current school year according to an enrollment count procedure or projection method outlined in the terms of the charter. This shall include funding on the basis of its actual or projected enrollment in the current school year in the charter school's first year of operation and in any year that the charter school significantly expands its enrollment as defined in State Board of Education Rule 160-4-9-.04. The local school system shall distribute to each local charter school the proportionate amount of federal funds for which the school is eligible under each federal program; provided, however, that these funds may be provided through the provision of in-kind services to the school by the school system upon agreement between the parties.

5. Pursuant to O.C.G.A. § 20-2-2068.1(c.3), the local board(s) shall publish in a prominent location on its website the calculation of earnings to each local charter school made in accordance with subsections (a), (b), and (c) of the Code section, including federal funds received by each local charter school.

(b) CHARTER SCHOOL FACILITIES FUNDS. Charter school facilities funds shall be awarded pursuant to O.C.G.A. § 20-2-2068.2. In each year in which charter school facilities funds are appropriated by the General Assembly for charter school facilities, the State Board of Education shall allocate the funds among eligible charter schools pursuant to accompanying grant Guidance.

(c) CHARTER SCHOOL CAPITAL FINANCING. In each year in which charter school capital financing funds are appropriated by the General Assembly pursuant to O.C.G.A § 20-2-2095 *et. seq.*, the State Board of Education shall establish a grant program in the form of matching funds for qualified charter school contributions, pursuant to accompanying grant guidance.

1. The State Board of Education shall determine the maximum amount of matching

funds authorized for each dollar of funds donated to a qualified charter school organization for any single charter school project. In so doing, the State Board of Education shall take into account local revenue, special-purpose local-option sales tax (SPLOST) and bond funding and shall view such local revenue and funding favorably in determining the amount of grant funds to authorize.

2. The matching grant funds shall apply to any eligible funds donated to a qualified charter school organization within the three (3) year period immediately preceding an appropriation by the General Assembly.

(d) CHARTER SCHOOL GRANTS. Charter school competitive grant applicants shall adhere to all application requirements and related timelines. Applicants should consult the Department's website http://www.gadoe.org for additional information and applications. In order to qualify for any charter school grant, applicants must meet all eligibility requirements. The Department shall have the right to determine eligibility for all grants and to adjust grant application procedures. Applications that do not meet eligibility requirements shall not be considered. All charter school grants shall be administered according to procedures outlined in the grant application.

(e) CHARTER SCHOOL ANNUAL OPERATING BUDGET. Pursuant to O.C.G.A. § 20-2-167.1, charter school governing boards, except for college and career academy governing boards, shall hold at least two (2) public meetings to provide an opportunity for public input on its proposed annual operating budget before adopting it. A summary or line-item version of the proposed budget shall be posted on a publicly available area of the board's website prior to the meetings. The public meetings shall not occur within the same week. Any other public meeting or hearing held that is related to the budget shall satisfy all or a portion of this requirement.

1. A summary or line item version of the adopted annual operating budget shall be posted and maintained on a publicly available area of the governing board's website until the annual operating budget for the next fiscal year is adopted by the board.

2. Upon request, a governing board shall provide, at no cost, an electronic copy of the line item version of the adopted annual operating budget in a suitable format within three (3) business days of such request. If the governing board elects to post a summary of the adopted budget, this summary shall give notice of the right to request an electronic copy of the line item version of the adopted budget.

(f) CHARTER SCHOOL OUTSTANDING DEBTS. If a local charter school is not renewed or is terminated, the nonprofit governing board shall be responsible for all outstanding debts of that school. The State Board of Education shall not be liable for any debts of the school in the event that the charter is not renewed or is terminated. A local school system shall not assume the debt from any contract for services made between the governing body of the charter school and a third party, unless otherwise agreed in writing.

(4) MANAGEMENT OF CHARTER CONTRACTS.

(a) EXECUTION OF CHARTER CONTRACTS. Approved nonprofit governing boards for charter schools or local boards of education for charter systems shall return a fully executed charter contract to the Department within sixty (60) days of receipt.

(b) CHARTER TRAINING. Charter schools and systems shall attend any required training. At the authorizer's discretion, charter schools and systems may be required to attend any additional training that the authorizer deems necessary and proper for the successful operation of the charter school or system.

(c) AMENDING A CHARTER CONTRACT. Pursuant to O.C.G.A. § 20-2-2067.1, the terms of a charter contract may be amended as follows:

1. The contract for a local charter school may be amended during the term of the charter upon the approval of the local board(s), State Board of Education, and the charter school governing board. Additional information and instructions for requesting an amendment may be found on the Department's website. All amendments must comply with requirements as established by the Department.

(i) Amendment requests that originate with the charter school governing board shall be submitted to the local board(s). The local board(s) shall, by a majority vote, approve or deny the proposed amendment no later than sixty (60) days after the local board(s) request is received, unless the local board(s) and the charter school governing board agree to extend the amendment review beyond sixty (60) days.

(ii) Amendment requests that originate with the local school board shall be submitted to the charter school governing board. The charter school governing board shall, by a majority vote, approve or deny the proposed amendment no later than sixty (60) days after the request is received unless the charter school governing board and the local board(s) agree to extend the amendment review beyond sixty (60) days.

(I) If the local board(s) and the charter school governing board agree to the amendment, the charter school shall forward the amendment to the Department for State Board of Education action.

(II) If the local board(s) and the charter school governing board do not agree to the amendment, the State Board of Education may recommend mediation upon the agreement of both the local board(s) and the charter school governing board. If mediation is unsuccessful, the charter continues in its unamended form.

(iii) For amendment requests that originate with the State Board of Education, the Department shall notify the charter school governing board and the local board(s) of the State Board's request to amend the charter.

(I) The charter school governing board and the local board(s) shall each, by a majority vote, approve or deny the proposed amendment no later than sixty (60) days after the request is received unless they agree to extend the review beyond sixty (60) days.

(II) If the local board(s) and the charter school governing board agree to the amendment, the charter school shall forward the approval to the Department for State Board of Education action.

(III) If the local board(s) and/or the charter school governing board do not agree to the amendment, the Department may recommend mediation upon the agreement of the local board(s) and the charter school governing board.

(IV) If mediation is unsuccessful, the charter continues in its un-amended form.

2. The contract for a charter system may be amended during the term of the charter upon the approval of the local board and the State Board of Education. Additional information and instructions for requesting an amendment may be found on the Department's website. All amendments must comply with requirements as established by the Department.

3. All charter contracts are subject to applicable federal and state laws, rules, and regulations and shall be deemed amended to reflect applicable changes to these laws upon the effective date of any such change.

(d) PLACING A CHARTER ON PROBATIONARY STATUS

1. The Department or the local board(s) of education may place a charter school or charter system on probation if it has reason to believe that any of the following have occurred or is imminent:

(i) A failure to comply with any recommendation or direction of the state board with respect to O.C.G.A. § 20-14-41;

(ii) A failure to adhere to any material term of the charter, including but not limited to the performance goals set forth in the charter;

(iii) A failure to meet generally accepted government accounting standards;

(iv) A violation of applicable federal, state, or local laws or court orders;

(v) The existence of substantial evidence that the continued operation of the charter school or charter system could be contrary to the best interest of the students or the community; or

(vi) A failure to comply with any provisions of O.C.G.A. § 20-2-2065;

(vii) For charter schools, the governing board has demonstrated an inability to provide effective leadership to oversee the operation of the charter school; and

(viii) For charter systems, the local board of education has demonstrated an inability to provide effective leadership to oversee the operation of the charter system.

(ix) A failure to disclose material information regarding violations or potential violations of any material term of the charter or applicable federal, state, or local laws or court orders.

(x) A failure to meet one or more of the academic, financial, and operational standards given in the Department's Performance Framework.

(xi) For charter schools, the school is identified as a turnaround eligible school as defined in O.C.G.A. § 20-14-45.

(xii) For charter systems, one-half or more of its system charter schools are identified as turnaround eligible schools as defined in O.C.G.A. § 20-14-45 for five or more consecutive years.

(xiii) Any other reason that would lead to the eventual termination of the charter if not resolved.

2. In the event that a charter school or charter system is placed on probation, the following shall apply:

(i) The Department and/or the local board of education shall provide written notice to the charter school or charter system of the reasons for such placement, not later than five days after the placement;

(ii) No later than thirty (30) days after the date of such placement, the charter school or charter system shall file with the Department and the local board of education a corrective action plan that addresses the reasons outlined for the probation and timeline for remedying those issues;

(iii) The Department may approve the corrective action plan as submitted or impose any additional terms of probation on the school or system that it deems necessary;

(iv) The charter school or charter system shall implement the Department-approved corrective action plan;

(v) During the term of probation, the Department may require the school or system to file interim reports concerning any matter deemed relevant to the probationary status of the school or system, including financial reports or statements.

(vi) The Department may amend the length of the probation based on the status of the interim reports.

3. A charter school or charter system may be taken off probation upon fulfilling the terms of its corrective action plan and upon the Department's determination that the conditions which precipitated the probation no longer exist and that no new conditions exist which would necessitate probationary status.

4. In the event that the charter school or charter system does not file or implement the approved corrective action plan within the required time period, or does not comply with the terms within the required time period, the State Board of Education or local board(s), as applicable, may move to terminate the charter.

5. No charter school on probation may enroll new students without the consent of the Department.

(e) TERMINATING A CHARTER.

1. Pursuant to O.C.G.A § 20-2-2068, the State Board of Education may terminate a local charter school if requested by a majority of parents or guardians of enrolled students *or* a majority of the faculty and instructional staff employed at the charter school; if requested by the charter school governing board; if requested by the local board(s); or upon determination by the State Board of Education by its own audit or other means.

(i) If requested by a majority of parents or guardians of enrolled students *or* a majority of the faculty and instructional staff employed at the charter school:

(I) The group requesting the termination, must, within thirty (30) days of the public meeting held pursuant to O.C.G.A. § 20-2-2068(a)(1)(A) or (B), submit a petition for termination to the State Board of Education, with a copy to the local board(s), which shall include the following:

I. A written statement detailing the reasons for termination pursuant to O.C.G.A. 20-2-2068(a)(2)(A)-(G), including supporting documentation;

II. Documentation showing that a public meeting and vote were held in accordance with the requirements of O.C.G.A. 20-2-2068(a)(1)(A) or (B);

III. A copy of the minutes of the public meeting where the termination request was voted upon;

IV. A written statement signed by a member of the group requesting termination. The statement shall specify that an identical copy of the materials has also been provided to the appropriate officials at the charter school. Appropriate officials shall include, at a minimum, the principal of the school, the president of the governing board, and the superintendent of the local board(s) of education that serves as the fiscal agent for the charter school; and

V. Any other pertinent information.

(II) The charter school governing board and local board(s) shall have thirty (30) days from receipt of the petition for termination to provide the State Board of Education with a written response to the petition.

(III) Upon receipt of the above records, and if requested by the charter school governing board or the local board(s) within thirty (30) days of such receipt, the State Board of Education may conduct a hearing prior to rendering a decision. If no such request is made within thirty (30) days of the State Board of Education's receipt of these records, all parties waive their right to a hearing and the State Board of Education may vote based upon information submitted by the parties or the State Board of Education may decide to hold a hearing prior to taking a vote.

(IV) If the State Board of Education votes to sustain the charter, it may consider the termination request and supporting documentation as a factor in its renewal decision.

(ii) For termination requests originating with the charter school governing board:

(I) The governing board must file a petition for termination with both the local board(s) and the State Board of Education within thirty (30) days of the vote to request termination.

(II) The petition for termination shall include:

I. A succinct statement of the reasons for the termination request;

II. The record of the vote taken by the charter school governing board.

(III) Upon receipt of the above records, and if requested by the local board(s) or the State Board of Education within thirty (30) days of such receipt, the State Board of Education may conduct a hearing prior to rendering a decision. If no such request is made within thirty (30) days of the State Board of Education's receipt of these records, all parties waive their right to a hearing and the State Board of Education may vote based upon information submitted by the parties or the State Board of Education may decide to hold a hearing prior to taking a vote.

(IV) If the State Board of Education votes to sustain the charter, it may consider the termination request and supporting documentation as a factor in its renewal decision.

(iii) For termination requests originating with the local board(s):

(I) Upon determining the existence of any ground for termination pursuant to O.C.G.A. § 20-2-2068(a)(2), the local board(s) shall provide appropriate notice of proposed termination to the charter school governing board as well as an opportunity for a hearing, if applicable, on the proposed termination in accordance with the policies established pursuant to (1)(a)(2)(v) of this Rule. If the local board(s) decides to move forward with termination, it must file a petition for termination with the State Board of Education within thirty (30) days of the determination.

(II) The request shall include a succinct statement of the reasons for the termination request, the transcript of the public hearing, including witness testimony to support its reasons for termination, other evidence as applicable, and the record of the vote taken by the local board(s) of education to terminate the charter;

(III) The local board(s) shall send a copy of all of the above to the charter school governing board at the same time as such documents are filed with the State Board of Education.

(IV) The State Board of Education shall treat all requests for termination from the local board(s) in accordance with O.C.G.A. § 20-2-1160.

I. The State Board of Education shall uphold the decision of the local board(s) if it finds sufficient evidence to sustain the decision.

II. The State Board of Education shall render a final written decision and shall notify the parties accordingly.

(iv) For termination requests initiated by the State Board of Education:

(I) The State Board of Education shall notify the charter school and the local board(s) of its intention to convene a hearing for the purpose of determining whether the charter school is in violation of a provision of O.C.G.A. § 20-2-2068(a)(2). The notification shall include the specific provisions of O.C.G.A. § 20-2-2068(a)(2) that the charter school is alleged to have violated and shall contain all information contained in O.C.G.A. § 50-13-13(a)(2).

I. If after receiving the notification, the charter school decides to surrender its charter contract instead of proceeding with the termination process, the governing board of the charter school shall provide to the State Board of Education a record of the vote taken by the governing board approving the surrender.

(II) The charter school and the local board(s) shall have thirty (30) days from the date of State Board of Education notification to submit one of the following to the State Board of Education:

I. A written response that addresses each of the allegations set forth in the notice and waives its right to a hearing by requesting the State Board of Education render a decision based on the written record; or

II. A written response that addresses each of the allegations set forth in the notice and requests the State Board of Education schedule a hearing to render a decision.

(III) If the charter school chooses to respond to the notice but waives its right to a hearing by requesting the State Board of Education render a decision based on the written record, the local board(s) and the Georgia Department of Education shall have ten (10) days to reply to the charter school's response and raise any objections to the hearing waiver request. If no objections are raised and the State Board of Education renders a decision on the written record, the decision shall be based upon: (1) the State Board of Education's notice to convene a hearing for the purpose of charter termination, (2) the school's response, (3) any response by the local board of education (4) any reply of the Georgia Department of Education or local board of education to the school's request to waive the hearing, and (5) any evidence contained therein noticed as proof by the State Board of Education. If objections are raised, the State Board of Education shall take those objections into consideration and determine whether the hearing should be waived.

(IV) If the charter school provides a written response that addresses each of the allegations set forth in the notice and requests the State Board of Education schedule a hearing to render a decision, the State Board of Education or designated hearing officer shall conduct a hearing and render a decision.

(V) If the hearing is conducted by a designated hearing officer, the hearing officer shall make a recommendation to the State Board of Education for consideration prior to the State Board rendering a decision.

(VI) If the charter school requests an expedited hearing, it shall notify the State Board of Education in writing within the 30-day response period. The local board(s) and the Georgia Department of Education shall have five (5) days to reply to the charter school's request and raise any objections to the expedited hearing. If the expedited hearing request is approved, the State Board of Education shall schedule a hearing and, if necessary, set a timeline for the charter school's submittal of a substantive response to the notice and a rebuttal by the local board(s) of education and the Georgia Department of Education.

(VII) If the charter school does not respond within the 30-day time period, then it waives it right to a hearing. The State Board of Education may render a decision as permitted under O.C.G.A. § 20-2-2068(a)(2).

2. Pursuant to O.C.G.A § 20-2-2068, the State Board of Education may terminate a charter system charter contract if requested by the local school governing team of a

system charter school; if requested by the local board; or by determination by the State Board of Education by its own audit or other means.

(i) For termination requests originating with the local school governing team of a system charter school:

(I) A petition to terminate a system charter must be submitted in writing by the local school governing team of a system charter school to the State Board of Education and to the local board of the charter system.

(II) The local board of the charter system shall have thirty (30) days from receipt of the petition for termination to provide a written response to the State Board of Education.

(III) Upon receipt of the petition for termination and following the thirty (30) day period for the charter system's response and at the request of an interested party, the State Board of Education shall conduct a hearing and determine whether the system charter shall be terminated. If no such request is made, the parties waive their right to a hearing and the State Board of Education shall vote based upon information submitted by the parties.

(IV) Nothing contained herein shall prevent the State Board of Education from proposing an amendment to the system charter to address the concerns raised by the request for termination.

(ii) For termination requests originating with the local board:

(I) The local board must file a petition for termination with the each system charter school's local school governing board and the State Board of Education within thirty (30) days of the vote to request termination.

(II) The petition for termination shall include:

I. A succinct statement of the reasons for the termination request; and

II. The record of the vote taken by local board

(III) Upon receipt of the above records, and if requested by the State Board of Education within thirty (30) days of such receipt, the State Board of Education may conduct a hearing prior to rendering a decision. If no such request is made within thirty (30) days of the State Board of Education's receipt of these records, the local board waives their right to a hearing and the State Board of Education may vote based upon information submitted by the parties.

(IV) If the State Board of Education votes to sustain the charter, it may consider the termination request and supporting documentation as a factor in its renewal decision.

(iii) For termination requests originating with the State Board of Education:

(I) The State Board of Education shall notify the local board of its intention to convene a hearing for the purposes of determining whether the charter system is in violation of a provision of O.C.G.A. § 20-2-2068(a)(2). The notification shall include the specific provisions of O.C.G.A. § 20-2-2068(a)(2) that the charter system is alleged to have violated and shall contain all information contained in O.C.G.A. § 50-13-13(a)(2).

(II) The local board of the charter system shall have thirty (30) days from the date of State Board of Education notification to file a response.

(III) After the thirty (30) day period for receiving a response has elapsed, the State Board of Education may conduct a hearing and render a decision in accordance with the policies established pursuant to this Rule.

3. In cases where the physical and/or mental health, safety, or welfare of students or staff of a charter school is in danger or where the charter school has experienced financial irregularities, any party to the charter or the State Board of Education may make an emergency termination request. The State Board of Education, through a regular or called meeting, may temporarily suspend the operations of the charter school until a termination hearing can be conducted. Depending on the nature of the danger or financial irregularity, the State Board of Education may request that the local board(s) assign the charter school students to another public school or take over operations of the charter school.

4. Upon termination of the charter for a local charter school, all assets of the terminated charter school purchased using state or federal grant funds, and all unencumbered state or federal grant funds awarded by the State Board of Education, shall revert to the local district and shall not be used by the school or its nonprofit governing board to satisfy liabilities.

5. Upon termination of the charter for a state charter schools, all assets of the terminated charter school remaining after liabilities have been satisfied shall revert to the SCSC for redistribution to other charter schools. This excludes assets purchased with or unencumbered funds derived from state or federal grants awarded by the State Board of Education, which shall revert to the Department and shall not be used by the school or its nonprofit governing board to satisfy liabilities.

6. Once a decision is made to terminate or not renew a charter, the charter school and the local board(s) shall notify affected charter school students and parents/guardians of the impending charter school closing and their public school choice options no later than one week after the decision is made to terminate or not renew the charter.

7. Pursuant to O.C.G.A. § 20-2-2063.3, in cases where a charter school authorized by a local board of education that fails to meet the principles and standards of charter school authorizing on the local board's annual evaluation for two consecutive years, the charter school may petition to transfer its charter authorization to the State Charter Schools Commission. If the State Charter Schools Commission approves the transfer of a petitioning charter school to its jurisdiction, the local board of education shall terminate the existing charter pursuant to the terms of the charter. The charter school shall maintain custody of its active student records during and upon completion of the transition.

(5) GOVERNANCE TRAINING. Pursuant to O.C.G.A. § 20-2-2072, the members of the governing board of each charter school shall participate in initial training for boards of newly approved local charter schools and annual training thereafter.

(a) TRAINING REQUIREMENTS.

1. New members of charter school governing boards and members of newly approved charter schools shall participate, at a minimum, in fifteen (15) hours of training within one (1) year of taking office. Board members with a break in service of more than one calendar year shall be considered new board members for training purposes. The training shall consist of the following minimum requirements:

(i) Three (3) hours of training on best practices on charter school governance; the constitutional and statutory requirements relating to public records and open meetings; and the requirements of applicable statutes and rules and regulations.

(ii) Three (3) hours of Charter School Finance and Budgeting Training on all topics included in Domain VII, Standard A, of the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards.

(iii) Three (3) hours Financial Governance Training on all topics included in Domain VII, Standard B, of the SBOE-adopted Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards. This training must be conducted by the Department's Finance and Budget Office.

(iv) Three (3) hours of Whole Board Governance Team Training.

(v) Three (3) hours of training that covers topics within the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards.

2. Charter school governing board members with one (1) or more years of board service shall participate, as a minimum, in nine (9) hours of training annually. The training shall consist of the following minimum requirements:

(i) Three (3) hours of Financial Governance Training on all topics included in

Domain VII, Standard B, of the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards. This training may be conducted by any State Board of Education-approved training provider.

(ii) Three (3) hours of Whole Board Governance Team Training.

(iii) Three (3) hours of training that covers topics within the Standards for Effective Governance of Georgia Nonprofit Charter School Governing Boards.

3. Charter School Governing Board member training must adhere to the following:

(i) Each board member training program must include training curricula aligned with State Board of Education governance standards for charter school governing boards.

(ii) All required board member training shall be conducted by charter school Training Providers approved by the State Board of Education unless otherwise specified in this rule.

(iii) Charter school governing boards and individual members may also participate in additional training based on identified needs.

(iv) The board chair shall receive training related to leadership duties of a board chair as some portion of the annual requirement.

4. Whole Board Governance Team training, at a minimum of three (3) hours, shall be conducted annually. The purpose of such training is to enhance the effectiveness of the governance team and to assess the continuing education needs of the board and school leader. The assessment of needs shall be based on the State Board-adopted standards for charter school governing boards and shall be used to plan the charter school adopted board training program.

5. The training for schools that are college and career academies shall adhere to the Standards for Effective Governance of College and Career Academies (CCA) approved by the State Board of Education in conjunction with the Technical College System of Georgia (TCSG), and shall be provided only by The Office of College and Career Transitions of TCSG unless otherwise specified in this rule.

(i) Board members of any college and career academy governing board in the first year of implementation of the college and career academy shall participate, at a minimum, in seven (7) hours of training within (1) year of taking office. The training shall consist of the following minimum requirements:

(I) Two (2) hours of training on the constitutional and statutory requirements relating to public records and open meetings; and the requirements of applicable statutes and rules and regulations for a college and career academy. This training

must be conducted by The Office of College and Career Transitions of TCSG.

(II) Two (2) hours of Whole Board Governance Team Training that covers topics within the Standards for Effective Governance of College and Career Academies. This training must be conducted by The Office of College and Career Transitions of TCSG.

(III) Three (3) hours of training that covers topics within the TCSG CCA Certification Standards, Community Workforce Development, and the role of the college and career academy and its partners. This training must be conducted by The Office of College and Career Transitions of TCSG.

(ii) New members of a college and career academy governing board shall participate, at a minimum, in seven (7) hours of training within one (1) year of taking office. Board members with a break in service of more than one calendar year shall be considered new board members for training purposes. The training shall consist of the following minimum requirements:

(I) Two (2) hours of training on the constitutional and statutory requirements relating to public records and open meetings; and the requirements of applicable statutes and rules and regulations for a college and career academy. This training may be conducted by The Office of College and Career Transitions of TCSG or any State Board of Education-approved training provider.

(II) Two (2) hours of Whole Board Governance Team Training that covers topics within the Standards for Effective Governance of College and Career Academies. This training must be conducted by The Office of College and Career Transitions of TCSG.

(III) Three (3) hours of training that covers topics within the TCSG CCA Certification Standards, Community Workforce Development, and the role of the college and career academy and its partners. This training must be conducted by The Office of College and Career Transitions of TCSG.

(iii) College and career academy governing board members with one (1) or more years of board service shall participate, as a minimum, in five (5) hours of training annually. The training shall consist of the following minimum requirements:

(I) Two (2) hours of Whole Board Governance Team Training that covers topics within the Standards for Effective Governance of College and Career Academies. This training may be conducted by The Office of College and Career Transitions of TCSG or any State Board of Education-approved training provider.

(II) Three (3) hours of training that covers topics within the TCSG CCA Certification Standards, Community Workforce Development, and the role of the college and career academy and its partners. This training must be conducted by The Office of College and Career Transitions of TCSG.

(b) TRAINING CONTENT FOR CREDIT HOURS:

1. Training credit hours will be awarded only on approved content aligned with the State Board of Education governance standards for charter schools.

(c) TRAINING PROVIDERS

1. Training Provider Rationale: The State Board of Education has adopted "State Board of Education governance standards for charter school boards" as the basis for charter school governing board member training. The approved charter school Training Providers will conduct charter school governing board member training utilizing curricula aligned with the State Board of Education governance standards for charter school governing boards and which meet identified areas for improvement as submitted in charter school governing boards' training program.

2. Charter school Training Providers wishing to provide charter school governing board training must be approved by the State Board of Education. To be considered for such approval, charter school Training Providers shall provide to the Department the following:

(i) Overview of the individual(s) or entity wishing to provide training.

(ii) Experience in providing charter school governing board training with references.

(iii) Instructors' qualifications.

(iv) Name(s) of training course(s).

(v) Length of training course(s).

(vi) Syllabus, which includes standard(s) to which each course is aligned.

(vii) Probable delivery method for delivery of content (whole board, large or small group, virtual, etc.).

(viii) Proposed location(s) of training course(s).

(ix) Fees (if any) to be charged for each training course.

(x) Participant evaluations of each training course.

(xi) List of charter school governing board members who participate in each training course.

(xii) Assurances that trainer will not provide training to charter school governing board members who are immediate members of the trainer's family without obtaining prior approval from the State School Superintendent or his designee. For the purpose of this assurance, immediate family members shall include a spouse, child, sibling, parent, or the spouse of a child, sibling or parent.

3. Only The Office of College and Career Transitions of TCSG may provide training to college and career academy governing boards unless otherwise specified in this rule.

4. The local school district shall not provide governing board training to charter schools under its control and management.

(d) STATE DEPARTMENT OF EDUCATION PROVISIONS

1. The Department of Education will:

(i) Receive assurance of the adopted charter school governing board training program plan.

(ii) Recommend Training Providers and courses for training credit for State Board of Education approval.

(iii) Periodically review the charter school governing board training program requirements and make recommendations for improvement.

(iv) Within three (3) months of the required assurance date of the charter school governing board training program plan publish the approved Training Providers and courses approved for training credit.

(v) Report to the State Board of Education annually on compliance with the training program requirements by members of charter school boards of education.

2. The State Board of Education shall adopt a model code of ethics for members of charter school governing boards. Such model code of ethics shall also include appropriate consequences for violation of a provision or provisions of such code. The State Board of Education may periodically adopt revisions to such model code as it deems necessary.

(i) Within three months of adoption by the State Board of Education of a model code of ethics pursuant to subsection (4)(d)(2) of this rule, each charter school governing board shall adopt a code of ethics that includes, at a minimum, such model code of ethics. Each charter school governing board shall incorporate into its code of ethics any revisions adopted by the State Board of Education to the model code of ethics pursuant to (4)(d)(2) of this rule within three months of adoption of such

revisions. Each charter school governing board member shall sign the adopted Code of Ethics.

3. The State Board of Education shall adopt a training program for members of charter school governing boards. The State Board of Education may periodically adopt revisions to such training program as it deems necessary.

(i) Within three months of adoption by the State Board of Education of a training program pursuant to paragraph (4)(d)(3) of this rule, each charter school governing board shall adopt a training program for members of such boards that includes, at a minimum, such training program and requirements established by the State Board of Education pursuant to paragraph (4)(d)(3) of this rule. Each charter school governing board shall incorporate any revisions adopted by the State Board of Education to the training program within three months of adoption of such revisions.

(ii) Each charter school governing board shall adopt its training program and any revisions thereto at a regularly scheduled meeting.

4. The State Board of Education shall establish a charter schools financial management certification program for charter school leaders and personnel who are responsible for the school's budget, accounting, payroll processing, purchasing, and ensuring the school's financial policies are in line with state and federal laws and best practices. The State Board of Education may periodically adopt revisions to such financial management certification program as it deems necessary.

5. No person shall be eligible to serve on a charter school governing board unless he or she:

(i) Has read and understands, as shown by signing, the code of ethics and the conflict of interest provisions applicable to members of a charter school governing board; and

(ii) Has agreed to annually disclose compliance with the State Board of Education's policy on training for members of charter school governing boards, the code of ethics of the charter school governing board, and the conflict of interest provisions applicable to members of the charter school governing board. Such disclosures shall be included in the charter school's annual report to the Department.

(iii) Charter School Governing Boards shall refer to the Department's website for additional guidance on Charter Schools Governance Training Standards, a model code of ethics, and a model conflict of interest policy.

(iv) State charter schools shall not be subject to requirements of this paragraph, but shall adhere to the training and eligibility requirements of O.C.G.A. § 20-2-2084 and rules of the SCSC.

(e) TRAINING STANDARDS.

1. Governance. The charter school governing board is charged with acting in a manner that focuses on improving student achievement and organizational effectiveness.

(i) The governance leadership team adheres to appropriate roles and responsibilities, as defined in State Board of Education rules and guidelines.

(ii) The governance leadership team executes its duties as defined in state law and State Board of Education rules and guidelines and ethical standards, which govern its conduct.

(iii) The governing board acts as a policy-making body, separate from the roles and responsibilities authorized to the school leader.

(iv) The governance leadership team demonstrates a unified approach to governing the charter school in order to assure effective fulfillment of roles and responsibilities.

2. Strategic Planning. The governance leadership team, in collaboration with the community, adopts and enacts a planning process that results in an adopted school strategic plan designed to improve student achievement and organizational effectiveness.

(i) The governance leadership team develops and adopts the school's strategic plan.

(ii) Annually and as needed, utilizing the adopted strategic planning process, the governance leadership team monitors and reports progress on performance measures.

3. Board and Community Relations. In order to ensure improved student achievement and organizational effectiveness, the governing board creates and sustains healthy community relations, models professional relationships, creates a culture of mutual respect, and serves as a charter school advocate for effective collaboration and engagement of internal and external stakeholders.

(i) The governance leadership team develops a process for creating a culture where input is sought, heard, and valued.

(ii) The board develops policies to ensure effective communication and engagement of all stakeholders' which support the strategic plan, desired culture and continuous improvement of the charter school.

(iii) The governance leadership team ensures processes that develop, communicate and maintain procedures for communications by stakeholders which result in resolution of issues and concerns supporting the strategic plan, desired culture and continuous improvement of the charter school. 4. Policy Development. The governing board adopts, revises, and follows written policies in accordance with laws and State Board of Education rules that include but are not limited to those that support improved student achievement, fiduciary responsibility, community and stakeholder engagement, organizational effectiveness, and continuous improvement.

(i) The governing board adopts, revises, and follows written policies that are clear, up-to-date, and in compliance with the charter school's strategic plan, state and federal laws and State Board of Education rules and guidelines.

5. Board Meetings. In order to conduct official business for the purpose of improving student achievement and organizational effectiveness, the local charter school governance leadership team plans and conducts board meetings in accordance with the Open Meetings Act.

(i) The board announces and holds meetings in accordance with the Open Meetings Act (O.C.G.A. § 50-14-1).

6. Personnel. The governing board employs, sets performance expectations for, and evaluates the work of the school leader.

(i) The governing board employs a school leader who acts as the Chief Executive Officer of the school. The school leader shall not serve simultaneously as the chief financial officer, or its equivalent, for the charter school.

(ii) The governing board evaluates the professional performance of the school leader.

7. Financial Governance. The governing board provides guidance to the school leader and sets sound fiscal policy so that the school is an effective steward of all resources to support student achievement and organizational effectiveness.

(i) The governing board upon recommendation of the school leader and an opportunity for public input adopts a budget that adheres to State law provisions and is consistent with its strategic plan.

(ii) The governing board adopts policy for sound fiscal management and monitors the implementation of the budget in accordance with state laws and regulations.

8. Ethics. The governance leadership team conducts themselves, collectively and individually, in an ethical and professional manner.

(i) The governing board adheres to, adopts and practices a Code of Ethics, avoids conflicts of interest, and annually reviews ethical standards to ensure and enhance governance structure and organizational effectiveness.

(ii) State charter schools shall not be subject to requirements of this section, but shall adhere to the training and eligibility requirements of O.C.G.A. § 20-2-2084 and rules of the State Charter Schools Commission.

Authority: O.C.G.A §§ 14-3-101, 20-2-880, 20-2-910, 20-2-1185, 20-2-2061 through 20-2-2074, 20-2-2080 through 20-2-2083, 20-2-2085 through 20-2-2086, 20-2-2088, 20-2-2090 through 20-2-2092, 20-2-2095.1 through 20-2-2095.5, 20-14-30 through 20-14-41, 20-2-204, 20-2-161, 20-2-164, 20-2-167.1, 50-14-1, 50-13-13, 50-18-70.

Adopted: August 24, 2017

Effective: September 13, 2017

GEORGIA STRATEGIC CHARTER SCHOOL GROWTH INITIATIVE

A PROPOSAL FOR FY2022 CSP GRANTS TO STATE ENTITIES

Presented by the State Charter Schools Foundation of Georgia

PART 7: OTHER ATTACHMENTS - APPENDIX C

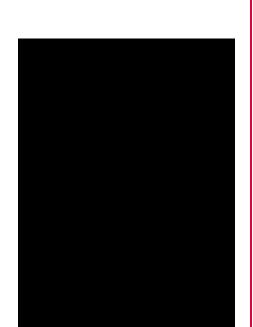
Letters of Support

•

- Governor Brian Kemp
- Lieutenant Governor Geoff Duncan
- Speaker Pro Tem Jan Jones
- Chairman Matt Dubnik, Georgia House of Representatives
- Chairman Chuck Payne, Georgia Senate
- Chaiman Jason Downey, Georgia State Board of Education
- Governor's Office of Student Achievement
- State Charter Schools Foundation of Georgia
- The State Charter Schools Commission of Georgia
- National Alliance for Public Charter Schools
- National Association of Charter School Authorizers
- Georgia Charter Schools Association
- Charter School Growth Fund
- redefinED atlanta
- GeorgiaCAN
- Georgia Center for Opportunity
- Lead With Excellence
- Gilbert, Harrell, Sumerford & Martin
- The Academy for Classical Education
- Amana Academy
- Atlanta SMART Academy
- Centennial Academy
- Du Bois Integrity Academy
- Fulton Leadership Academy
- Genesis Innovation Academy
- Georgia Connections Academy
- Georgia School for Innovation and the Classics
- International Charter Academy of Georgia
- Ivy Preparatory Academy
- The Kindezi Schools
- KIPP Metro Atlanta Schools
- Miles Ahead Charter School
- Odyssey Charter School
- Pataula Charter Academy and Spring Creek Charter Academy
- Resurgence Hall
- Scintilla Charter Academy (2)
- The Anchor School
- Tybee Island Maritime Academy
- Utopian Academy for the Arts
- ZEST Preparatory Academy
- Goodwill Southeast Georgia









STATE OF GEORGIA OFFICE OF THE GOVERNOR ATLANTA 30334-0090

Brian P. Kemp GOVERNOR

August 2, 2022

Dr. Anna Hinton Director, Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dear Dr. Hinton:

I write to express my strong support for Georgia's application to the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). The proposal from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) will provide essential funding and technical assistance to establish and expand high quality charter schools for Georgia families.

As Governor of Georgia, I have consistently and steadfastly supported education, particularly in empowering local communities and families to make decisions that are in the best interest of their citizens and students. As part of my commitment to educational choice, I proudly awarded a GEER II grant to establish the Georgia Strategic Charter School Growth Initiative, which provides intensive technical assistance and grants to develop new, replicating and expanding charter schools in communities without a high quality charter school option. The CSP grant will allow Georgia to expand upon this work, develop community-based charter schools and improve the charter sector in our state.

Thank you for your consideration of Georgia's proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia.

Sincerely,





OFFICE OF LIEUTENANT GOVERNOR

240 STATE CAPITOL

ATLANTA, GEORGIA 30334

GEOFF DUNCAN LIEUTENANT GOVERNOR

August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's students. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

• The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSC's foundation shows the strong commitment



OFFICE OF LIEUTENANT GOVERNOR

240 STATE CAPITOL ATLANTA, GEORGIA 30334

GEOFF DUNCAN LIEUTENANT GOVERNOR

> to supporting charter schools in Georgia. Together, they will strengthen quality in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.

- Grant funds are essential for high-quality charter schools to consider replicating or expanding, and Georgia offers the technical assistance that schools need to grow sustainably and successfully.
- The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs. It is important that these schools have the ability and resources to serve all communities in Georgia in an inclusive and supportive manner.
- To that point, the SCSC's new strategic plan emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia.
- GaDOE provides ongoing support and technical assistance to charter school authorizers in Georgia and is offering a series of learning modules developed by the National Association of Charter School Authorizers that support the newlyadopted Georgia Charter School Authorizer Standards. These efforts will help all charter schools and continue to strengthen relationships between charter schools and their authorizers.
- The Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a website to share information about charter schools with families and communities, including a charter school search engine. The CSP grant award will



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240 STATE CAPITOL ATLANTA, GEORGIA 30334

GEOFF DUNCAN LIEUTENANT GOVERNOR

> allow the SCSF to build on this website and other charter school communication efforts to increase engagement between charter schools and communities.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia.

Sincerely,

Geoff Duncan Lt. Governor



House of Representatives

JAN JONES

SPEAKER PRO TEM

STATE CAPITOL, ROOM 340 ATLANTA, GEORGIA 30334 (404) 656-5072 (O) (404 657-0498 (FAX)

12580 Hwy. 9, Suite 600-356 Milton, Georgia 30004 EMAIL: jan.jones@bouse.ga.gov

August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dear Dr. Hinton:

I write to express my strong support for the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). The proposed grant strategy to provide funding and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

As Speaker Pro Tempore of the Georgia House of Representatives, I have staunchly supported the establishment and expansion of high quality charter schools throughout our state. I authored the enabling legislation to establish Georgia's independent statewide charter school authorizer and have led numerous legislative initiatives to strengthen Georgia's charter ecosystem. The funds available through the Charter Schools Program grant will catalyze the efforts of the Georgia General Assembly to reinforce quality authorizing at the state and local levels, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.

Thank you for your consideration of Georgia's proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia.

With regards,

Jan Jones SpelakePertFrempor

STANDING COMMITTEES:

APPROPRIATIONS EDUCATION ETHICS REAPPORTIONMENT RULES



House of Representatives

401-J State Capitol 206 Washington Street SW Atlanta, Georgia 30334

STANDING COMMITTEES

Education – Chairman Appropriations – Secretary Game, Fish, & Parks Higher Education Interstate Cooperation Juvenile Justice Small Business Development Ways & Means – Ex-Officio

August 1, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dr. Hinton –

MATT DUBNIK

Representative

District 29

Gainesville & Hall County

matt.dubnik@house.ga.gov

404-656-0213

I strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.



Grant funds are essential for high-quality charter schools to consider replicating / expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.

The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs.

The SCSC's new strategic plan emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia.

GaDOE provides ongoing support and technical assistance to charter school authorizers in Georgia and is offering a series of learning modules developed by the National Association of Charter School Authorizers (NACSA) that support the newly adopted Georgia Charter School Authorizer Standards. These efforts will help all charter schools and continue to strengthen relationships between charter schools and their authorizers.

The Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a website to share information about charter schools with families and communities, including a charter school search engine. The CSP grant award will allow the SCSF to build on this website and other charter school communication efforts to increase engagement between charter schools and communities.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,



Chairman Education Committee Georgia House of Representatives

CHUCK PAYNE

District 54 320-A Coverdell Legislative Office Building 18 Capitol Square, SW Atlanta, Georgia 30334 Phone: (404) 463-5402

E-mail: chuck.payne@senate.ga.gov



The State Senate Atlanta, Georgia 30334

COMMITTEES:

Education and Youth, Chair Appropriations - Ex Officio Finance - Secretary Higher Education - Secretary Public Safety - Ex Officio State and Local Government Operations Vice Chair

August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

- The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.
- Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.
- The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs.
- The SCSC's new strategic plan emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for PR/Award # S282A220006 Georgia.

- GaDOE provides ongoing support and technical assistance to charter school authorizers in Georgia and is offering a series of learning modules developed by the National Association of Charter School Authorizers (NACSA) that support the newly-adopted Georgia Charter School Authorizer Standards. These efforts will help all charter schools and continue to strengthen relationships between charter schools and their authorizers.
- The Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a
 website to share information about charter schools with families and communities, including a
 charter school search engine. The CSP grant award will allow the SCSF to build on this website
 and other charter school communication efforts to increase engagement between charter schools
 and communities.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Chuck Payne Senator, District 54



August 5, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

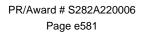
Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The Georgia State Board of Education recently adopted new charter school authorizer standards, and we are committed to ensuring high-quality charter school authorizing in our state. The Georgia Department of Education (GaDOE) provides ongoing support and technical assistance to charter school authorizers and is offering a series of learning modules developed by the National Association of Charter School Authorizer Standards.

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Richard Woods, Georgia's School Superintendent An Equal Opportunity Employer



These efforts will help all charter schools and continue to strengthen relationships between charter schools and their authorizers.

We are committed to high-quality public education in Georgia. The partnership between the State Charter Schools Commission, the State Charter Schools Foundation, and GaDOE demonstrates our willingness to partner to build better charter schools for Georgia's families together.

Thank you for your consideration of this investment in charter schools in Georgia so that we can offer charter school options to more students across our state.

Sincerely,

Jason Downey Chairman Georgia State Board of Education Brian Kemp Governor



Governor's Office of Student Achievement Joy Hawkins Executive Director

August 3, 2022

Dr. Anna Hinton, Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

The Governor's Office of Student Achievement (GOSA) strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help community-based schools deliver high-quality education to students in this state. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, expanding charter schools through a GEER II grant.

This grant aligns to Governor Brian Kemp's goal to ensure that students in all parts of Georgia have an opportunity to attend a school that provides an excellent education. The partners applying for this grant are committed to the same goal. I am confident that these entities will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to provide the best education possible for Georgia's students.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

Sincerely,

Joy Hawkins Executive Director



August 3, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dear Dr. Hinton:

We are excited to present this proposal for the FY2022 CSP State Grants to State Entities (84.282A) to support the measured growth of high-quality charter schools, ensure sound charter school authorizing practices, disseminate charter school best practices, and educate Georgians about charter schools. Our proposed strategy to provide grants coupled with technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The mission of the State Charter School Foundation of Georgia, the nonprofit, charitable arm of the State Charter Schools Commission of Georgia, is to support high-quality state charter schools serving children throughout Georgia by leveraging resources to help schools launch, build capacity, and grow. We provide grants, product donations, training, and technical assistance to the 43 schools authorized by the SCSC across Georgia. Over the last two years, we have also provided substantial support, donations, and technical assistance to locally-authorized charter schools, and we participate in committees and activities to support the charter school sector as a whole in Georgia and beyond.

The SCSF is the grant recipient and administrator of a GEER II fund grant to create the Georgia Strategic Charter School Growth Initiative. The SCSF is the only statewide grantmaking body for charter schools, and we have worked diligently to

The State Charter Schools Foundation of Georgia, Inc. is a 501(c)(3) charitable organization, EIN 47-4742575.

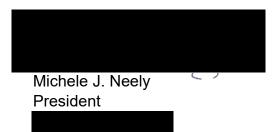
establish sound practices to manage federal grants effectively with fidelity. We are fully prepared to carry out the activities described in this proposal and lead the effort with integrity and transparency. This CSP grant will allow us to build upon the strong foundation we have created with the Charter Growth Initiative and achieve long-lasting outcomes.

Georgia's efforts align with the U.S. Department of Education's proposed intent to promote careful, data-driven planning for newly created charter schools and initiatives to expand or replicate existing high-quality ones. If awarded, the CSP grant will support the growth of high-quality charter school options in areas with the most need, bolster charter school communication efforts to increase engagement between charter schools and their authorizers, and reinforce transparent governance and operational practices.

We are proud to submit this application for the State of Georgia with our partners, the Georgia Department of Education and the State Charter Schools Commission of Georgia. Together, we will build on each other's strengths and collaborate to serve charter schools, communities, and students. We believe that we have assembled the strongest possible consortium to carry out the activities described in the proposal and achieve our ultimate goal of ensuring that every community and every child in Georgia has access to a high-quality public school that meets their needs.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

Sincerely,



Adria Welcher, PhD Board Chair



STATE CHARTER SCHOOLS COMMISSION OF GEORGIA

Buzz Brockway Chairman Lauren Holcomb Executive Director

August 3, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dear Dr. Hinton:

On behalf of the State Charter Schools Commission of Georgia (SCSC), I write to express my strong support for Georgia's application to the U.S. Department of Education (U.S. Ed) FY 2022 Charter Schools Program (CSP) Grants to State Entities (84.282A). As Georgia's statewide independent charter school authorizing board and a co-applicant in the application, the SCSC is firmly committed to the expansion of high-quality charter schools for students most in need. The partnership outlined in this grant proposal between the SCSC, State Charter Schools Foundation of Georgia, and the Georgia Department of Education will build upon the collective efforts of Georgia's charter sector partners to transform the lives of children by providing excellent educational options.

The mission of the SCSC is to improve public education by authorizing high-quality charter schools that provide students with better educational opportunities than they would otherwise receive in traditional district schools. Additionally, the SCSC's newly adopted strategic plan emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia. I am particularly excited that this grant will catalyze the vision of the SCSC – innovative and superior charter schools advancing education in every community - and expand the existing Georgia Strategic Charter School Growth Initiative, which was established to support the scaling and expansion of high performing charter schools.

Georgia is uniquely positioned to implement the priorities that U.S. Ed has outlined in the CSP grant due to the foundational layers that already exist in our state. The SCSC, SCSF and GaDOE provide technical assistance that schools need to grow sustainably and successfully, and the SCSC has an expedited petition application for expansions and replications, aligned with national best practices. Our state is also staunchly committed to authorizer accountability. GaDOE provides ongoing support and technical assistance to charter school authorizers in Georgia and is offering a series of learning modules developed by the National Association of Charter School Authorizers (NACSA) that support Georgia's newly-adopted Principles and Standards for Charter School Authorizers. The CSP grant award will support the partnership between the SCSC, SCSF, and GaDOE and

allow us to strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to effectively serve students.

Georgia's efforts align with U.S.Ed's intent to promote careful, data-driven planning for newly created charter schools and initiatives to expand or replicate existing high-quality ones. If awarded, the CSP grant will support the growth of high-quality charter school options in areas with the most need, bolster charter school communication efforts to increase engagement between charter schools and communities, strengthen relationships between charter schools and their authorizers, and reinforce transparent governance and operational practices.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia.

With regards,

Lauren Holcomb Executive Director The State Charter Schools Commission of Georgia



August 3, 2022

The Honorable Miguel Cardona Secretary, United States Department of Education 400 Maryland Ave., SW Washington, DC 20202

Dear Secretary Cardona,

I am pleased to provide this letter in support of the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 Charter Schools Program Grants to State Entities competition. The National Alliance for Public Charter Schools is the leading national nonprofit organization committed to advancing the public charter school movement.

For almost 30 years, public charter schools have played an important role in ensuring high-quality educational opportunities are available to families across Georgia. Across the state, 90 charter schools serve almost 70,000 students. This small community represents just 4% of public school enrollment in the state, but serves a significant proportion of students of color and from low-income communities. New CSP funding in the state will help make it possible for more charter schools to open in the communities that need them most.

The proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant. The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective. The proposal also emphasizes geographic priority areas to expand opportunities in underserved communities and requires new schools to ensure they are meeting local community needs. By supporting schools in the communities that need them most, this grant would help more students have access to a school that meets their unique needs.

We believe that the Georgia proposal will have a meaningful impact on the lives of thousands of families across the state, and we are happy to support their application.

Respectfully,



Nina Rees President and CEO

> 800 Connecticut Ave NW Suite 300 Washington, D.C. 20006 202.289.2700



1 E. Erie St Suite 525 #380 Chicago, IL 60611 T: (312) 376-2300

www.qualitycharters.org

August 5 ,2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

NACSA strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The Charter School Program Grant, which Georgia has received in the past, helps support the state's plan to maintain a high standard for charter school authorizing in Georgia. NACSA currently works with both the State Charter Schools Commission and the Georgia Department of Education to improve authorizing standards and practices across the state and provides regular training to Georgia authorizers on national best authorizing practices. NACSA plans to remain a strong partner under the proposed grant and looks forward to supporting Georgia's vision and pursuit of authorizing excellence in the future.

Thank you for your consideration of this proposal to provide financial and technical support to charter schools in Georgia.

With regards,

Amy Ruck Kagan Managing Partner National Association of Charter School Authorizers

PR/Award # S282A220006

ALL CHILDREN DESERVER 200 ALITY EDUCATION.



August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: Support for Georgia and FY 2022 CSP Grants to State Entities (84.282A)

I am writing to convey our full support of the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). The plan is to grant support and technical assistance to new, replicating, and expanding charter schools in Georgia. This grant will complement the current Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

My organization, Georgia Charter Schools Association (GCSA), exists to support the creation and operation of high-quality charter schools to increase parental choice and improve educational outcomes of Georgia's K-12 students. Currently, Georgia has less than 100 free-standing, autonomous public Charter Schools that serve approximately 70,000 students. Most of these Charter Schools are in metro Atlanta, with the most of

those schools authorized and located within the service bounds of the Atlanta Public School System.

More specifically, GCSA operates a New School Development program that works with communities, volunteer boards, and potential school founders and leaders to create additional charter schools around the State of Georgia. The New School Development program works in partnership with Building Excellent Schools (national) and RedefinED (Atlanta) to maintain a pipeline of school leadership talent and trained Board Members to guide the operation of new and existing charter schools.

For over ten years, we have worked in concert with the State Charter Schools Commission (SCSC) of Georgia in the endeavor to grow the number of new charter seats and broaden the geographic availability of high-quality Charters across the State of Georgia.

Our joint efforts will require substantial investment from the Charter School Program grant fund for the following work of creating new Charter Schools, replicating and expanding high-quality Charters in Georgia. The absence of CSP funding will choke off the future growth of Charters in Georgia—especially in the areas outside of Atlanta and stretching to the rural areas of Georgia where resources are extremely scarce to help fund new Charter School creation, replication, and expansion. We are fully committed the strategic plan of the SCSC to establish geographic priority areas for charter petitions and to expand opportunities into underserved communities.

Thank you for your consideration!

Sincerely,

Anthony D. "Tony" Roberts, PhD President and CEO



8/3/2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

The Charter School Growth Fund (CSGF) – a national nonprofit investing in talented education leaders building networks of excellent public charter schools – strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A).

CSGF identifies the country's best public charter schools, funds their expansion, and helps to increase their impact. The respective proposed strategy would provide grants and technical assistance to new, replicating, and expanding charter schools, which aligns with our shared vision for all of Georgia's children to have access to a high-quality education at a community-based school.

This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant. This strategy is in line with CSGF's work, which is to provide funding and support to a community of school leaders who seek to grow and serve more students, whether they are starting a new school, expanding from one to two schools, or building a network of many schools.

To date, CSGF has invested in eight high quality charter schools who received subgrants from the State Entities grant in Georgia: Amana Academy, KIPP South Fulton, KIPP WAYS, KIPP Strive, KIPP Vision, Pataula Charter Academy, DuBois Integrity Academy, and Resurgence Hall Charter School. The combined total award for the eight organizations is roughly **Constitution**. Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.

The ongoing partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in the state, disseminate best practices from charter schools widely, and ensure that charter schools have the necessary resources to be effective for students and families. Evidence of this success can be seen in examples like Pataula Charter Academy, a

CSGF portfolio member, State Entities subgrant recipient, and one of the top charter schools in Georgia serving a population of predominantly rural and low-income students.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia.

With regards,



Darryl Cobb President Charter School Growth Fund



830 Glenwood Ave SE Suite 510-224 Atlanta, GA 30316 redefinEDatlanta.org

July 29, 2022

Dr. Anna Hinton Director, Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Founded in 2016, redefinED atlanta is an education reform intermediary comprised of philanthropic, civic, and grassroots community leaders dedicated to a vision of an Atlanta where every student, in every community, receives a great public education. To realize this vision we engage with communities, advocate for equity, and fund critical work to drive systemic level improvement in K-12 public education for students and families. One of our primary strategies is to increase the number of high-quality charter schools in Atlanta. To date, we have supported almost 10,000 additional charter school seats within the city of Atlanta and border communities. We invest in charter school incubator programs, fund pre-authorization planning, start-up operations, strategic capacity-building efforts, and facilities technical assistance to make this possible, and have leveraged relationships and momentum to attract over \$25M in national funding partnerships to support charter school growth in metro Atlanta.

CSP has been a critical factor in the growth of high-quality charter schools serving Georgia, and our landscape is poised to create even greater impact for students and communities because:

- The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.
- Through redefinED atlanta, these and other partners, Georgia offers the technical assistance schools need to grow sustainably and successfully and we are motivated and able to support schools so that they can thrive.
- GaDOE provides ongoing support and technical assistance to charter school authorizers in Georgia and ispectional section authorizers in Georgia and ispection and ispece



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National Association of Charter School Authorizers (NACSA) that support the newlyadopted Georgia Charter School Authorizer Standards. These efforts will help all charter schools and continue to strengthen relationships between charter schools and their authorizers.

• There is continued and growing demand from families who need access to highquality charter school options across Georgia. The CSP grant award will allow the SCSF to build on its outreach and other charter school communication efforts to increase engagement between charter schools and communities.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

In partnership,



Ed Chang Executive Director redefinED atlanta



August 1, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

As the Executive Director of GeorgiaCAN, a local education advocacy organization that works to prioritize the needs of students in our state, I write to you in strong support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

At GeorgiaCAN, our mission is to ensure all students in Georgia have the opportunity to attend a great school and receive a great education that prepares them for future academic and professional success. This is why, throughout the past decade, we have been steadfast supporters of our state's charter schools – which offer innovative educational approaches for Georgia's families.

While Georgia is blessed to have many quality school choice options, many communities in our state are still lacking. Fortunately, the SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs. The grant funds in this proposal are essential for expanding quality public school choice options for Georgia families by replicating highly-effective charter schools in more parts of our state.

We believe that every child is unique and deserve to attend a great school that best fits them and their individual needs. This is the aim of school choice and the goal of this proposal. By growing the number of quality charter schools across the state, we will provide more students with educational opportunities to attend a school that is the best fit for them and sets them on a pathway of success in life.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Michael O'Sullivan Executive Director GeorgiaCAN



August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The Georgia Center for Opportunity brings together the solutions that lift people from poverty. Our desire is that each person be given the opportunity to achieve their potential. Education plays a key role in the opportunity young people have to achieve that potential.

The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.

Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia.

With regards,

Buzz Brockway Vice President for Public Policy Georgia Center for Opportunity

LEAD WITH EXCELLENCE

July 25, 2022

Dr. Anna Hinton
Director
Charter School Programs
U.S. Department of Education, OESE
400 Maryland Ave SW
Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Lead with Excellence strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Lead with Excellence provides a 12-month Leadership Institute to empower founding Georgia charter leaders with key knowledge, skills, and mindsets to lead their organization to a strong

start in service of K-12 students. We believe that students throughout Georgia, especially in our rural communities, deserve great schools with great leaders. The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

Best,



Tori Hines Founder

GILBERT, HARRELL, SUMERFORD & MARTIN A PROFESSIONAL CORPORATION 675 PONCE DE LEON AVE NE SUITE 7500, 8500 & NE223 ATLANTA, GA 30308 WWW.GILBERTHARRELLLAW.COM

Robert L. Fortson, Partner

rfortson@ghsmlaw.com

August 4, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dear Ms. Hinton,

I write to you in support of application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). As an attorney practicing in the Georgia charter school arena for more than a decade, I have had a front row seat to the maturation and expansion of this important education option in our state. This proposal, which will provide grants and technical assistance to new, replicating, and expanding charter schools, will help ensure that community-based schools have the support they need to offer high-quality education to all of Georgia's children. By continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, they will also provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Through our work representing charter schools around the state of Georgia, we have worked closely with the SCSC, the GaDOE, and the SCSF to ensure that these educational enterprises receive the support they need to be specific. Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully. We share the SCSC's commitment to ensuring that these school exist not just for students in the Metro Atlanta region, but also expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs. As a charter school parent and the husband of a charter school board member, I can also personally confirm that it takes a village to make these schools successful and having the added support of these state and federal grants can be a game changer!

Thank you for your consideration of this proposal to provide financial and technical support to our charter schools in Georgia. This will make a huge difference for our students!

Sincerely,

/s/ Robert L. Fortson Gilbert Harrell Sumerford & Martin



The Hcademy for Classical Education

2020 National Blue Ribbon School Awardee

~ Exemplary High Performing~



August 3, 2022

Dr. Anna Hinton Director, Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dear Dr. Hinton:

The Academy for Classical Education (ACE) strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating and expanding charter schools through a GEER II grant.

The Academy for Classical Education opened in 2014 and has since been named a 2020 National Blue Ribbon School for academic achievement. ACE has consistently academically outperformed the local districts as well as the state and has provided parents an opportunity for their child to be able to receive an exemplary educational experience in a public-school setting. Without the initial start-up funding ACE would not be in existence. That funding allowed us to purchase furniture, technology and equipment that we simply did not have the funds to buy based on our per-pupil funding that we received from the local board of education at that time.

This funding evidences a commitment on so many levels to provide students from all areas of a community a more rigorous, high-quality education. Without this funding, high-quality charter schools simply could not initially have the capitol to operate. Investing in schools like ACE, gives real meaning to the opportunities provided by schools of choice and we remain grateful every day that we had the chance to avail ourselves of this opportunity.

Sincerely,

Laura Perkins Principal/CEO

"Where teachers can teach, and students will learn." _

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August 3, 2022

Dr. Anna Hinton Director, Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

I hope you are doing well. I manage a network of two charter schools in the metro-Atlanta area, and I want to convey that we strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Serving a thousand students, Amana Academy was established in 2005 with a locally approved K-8 charter, and next week we are excited to be opening our first replica campus authorized by the State Charter Schools Commission. CSP investments were critical to our establishment and our decision to replicate our successful program. We take seriously our role as a 'crucible of innovation', which we have been able to fulfill on through CSP dissemination grants that allowed us to share our STEM-themed EL Education (formally Expeditionary Learning) with other educators and schools. We serve a spectacularly diverse student body; and at our flagship school we are proud to state that we are performing as a Highest Rewards Title I school and that virtually 100% of our graduates have gone on to graduate from high school. By setting high expectations with our faculty to share best practices, CSP dissemination grants were catalysts for our

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school to achieve highly coveted STEM Certified School designation by the GaDOE, and EL Credentialed School status. The planning and implementation grants were foundational to our governing board's decision to replicate. The new school will open in collaboration with Girl Scouts of Greater Atlanta located within their 250 acre Camp Timber Ridge site. With the pressures of facilities development, we simply could not open without the support of CSP during our planning year and first year curricular, training, and equipment expenses. In a word, we are grateful for CSP and what it has meant for the lives of the thousands of students we have served over the years.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,



Ehab Jaleel Co-Founder and Executive Director Amana Academy

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8/1/22

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We are writing in support of the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools like ours have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

As a new school which opened in August of 2021, we know first hand the impact that CSP funds will have on students and schools. Prior to opening, we utilized CSP funds to purchase critical curriculum resources including books and devices for every student. This was incredibly helpful for navigating virtual learning and ensuring students had uninterrupted access to learning materials. CSP funds help start up schools in communities like ours that lack financial means to support the opening of a new school but have a high need for quality education. Additionally, we were able to compensate staff that were critical to the planning and implementation of the school program prior to the beginning of the school year. We are grateful for the support of the

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CSP to assist us with successfully opening and serving 125 5th, 6th and 7th graders last year and growing to serve 225 5th through 8th graders this year. We look forward to utilizing CSP funds to expand to serve high school students over the next few years based on the feedback and demand from our community. Without funds from the CSP, we would not have been able to provide our students with high quality learning materials. In addition to our prior experience with CSP, our students and community will greatly benefit from the SCSC's new strategic plan which emphasizes the creation of new charter high schools, recognizing that this is an area of high need for Georgia.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Patrice Meadows Founder/Executive Director Atlanta SMART Academy

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August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Centennial Academy is a conversion charter school in the heart of Atlanta, educating scholars in Kindergarten through 8th grade. The school's mission is to provide educational equity through a rigorous STEAM curriculum to all of its scholars The school's curriculum is centered in Project-based Learning with a focus on STEAM and Social-Emotional Learning. As a community school, Centennial Academy readily extends beyond its campus borders in strong partnerships with institutions of early and higher learning, industry, and social services such as Georgia Tech, Georgia Aquarium, YMCA Metro Atlanta, Georgia Natural Gas, Coca-Cola, and The Integral Group.

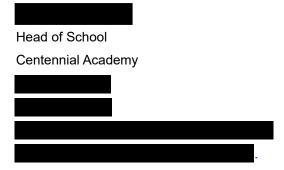
The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective. As a single site charter, having access to resources and best practices within the greater charter community is invaluable. As we look to the future of the scholars at Centennial and consider how to expand our impact we know that grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably



and successfully. Without financial and technical support many single-site charter schools like Centennial would not have the opportunity, assistance, or resources needed to explore or consider future expansion and/or replication that neighborhoods, like Centennial Place, need and desire.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,





August 1, 2022 Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

As Executive Director for Du Bois Integrity Academy (DIA) located in Riverdale, Georgia (metro-Atlanta area), I understand the unique challenges that charter schools face to improve the academic success for low-income children. We must be willing to do whatever it takes for as long as it takes to accomplish this worthy goal. We believe academically prepared students who have resilience and grit can "make a mark" in the world for the good of themselves and others. Since our charter was approved in 2014 by the State Charter School Commission (SCSC) of Georgia, the DIA family has committed to providing a remarkable education for our students using research-based STEAM (Science, Technology, Engineering, Arts, and Mathematics) instructional practices, high-quality teachers and leaders training, and virtually infused learning supports system that are deeply rooted in our school day and community.

The CSP funds would enable our state, and charter schools like ours, who are ready to expand and duplicate successful education models to our local community and other communities that serve primarily minority and/or low-income children who have less to begin with it, and if nothing changes in their educational systems, are likely to continue to live below the poverty line. We believe committed people, states, and communities working together can change this cycle of poverty trajectory by expanding opportunity, cultivating hope, and educating with purpose. Our charter school has formed a

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partnership with our local school district, Clayton County (Georgia) School District to reach children earlier though pre-kindergarten initiatives aimed at providing age appropriate Pre-K schooling to improve children's readiness for kindergarten and beyond.

With a committed educational plan in place and highly trained administrators and teachers who are deeply committed to continuous improvement, by 2017, DIA was recognized by the Governor's Office of Student Achievement as a high performing charter school receiving the "Beating the Odds" state designation for student achievement and growth. The same year, DIA scored in the top 10% of all public schools in Georgia in student achievement growth. This was no small feat considering student achievement for the charter school's inaugural year where state test results showed that more than 60% of students entered the charter school the 2014-2015 school year performing below proficient in core content areas.

This academic success continued a positive trajectory until the onset of the COVID 19 pandemic where children had to shelter in place and be educated 100% virtually. This caused some setbacks; however, the DIA academic leaders are committed to getting back on track academically. Test scores for the 2021-2022 school year showed improvement in student achievement progress over the 2020-2021 school year. And state scores for DIA in 2022 show our charter school outperformed the local school district in all core content areas and outperformed the entire state in one. Through our experiences in Riverdale (Clayton County), GA, one of the poorest municipalities in Georgia, we know how to connect academically to low-income children needs and interests and how to engage high-poverty families in ways that encourage parents to become meaningfully involved in their child's education. There is no substitute for experience and effective actionables capable of producing systemic, sustainable, and positive change. Our leadership and academic team at DIA fully support the following tenets of Georgia's CSP application that will be beneficial and impactful for low-income communities like ours are:

- The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.
- Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.
- The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs.
- The SCSC's new strategic plan emphasizes charter school growth in rural charter school communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia.



- GaDOE provides ongoing support and technical assistance to authorizers in Georgia and is
 offering a series of learning modules developed by the National Association of Charter School
 Authorizers (NACSA) that support the newly adopted Georgia Charter School Authorizer
 standards. These efforts will help all charter schools and continue to strengthen relationships
 between charter schools and their authorizers.
- The Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a
 website to share information about charter schools with families and communities, including a
 charter school search engine. The CSP grant award will allow the SCSF to build on this website
 and other charter school communication efforts to increase engagement between charter
 schools and communities.

On behalf of the staff, administrators, school board, parents, and children and families of Du Bois Integrity Academy, we thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in the state of Georgia.

With regards,

Craig Cason Executive Director Du Bois Integrity Academy



Board of Directors Barbara Catledge-Hall, Ed.S. Chair John Blackshear, Vice Chair John Lawrence, Treasurer Walter Sullivan, Ph.D. Fundraising Chair Gabriel Fortson, Board Member Joyce Lewis, Board Member

Richardean Golden Anderson, Ed.S Superintendent

Nash Alexander, III, Principal

"Where Young Men Soar to Greater Heights"

August 3, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Fulton Leadership Academy strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Fulton Leadership Academy is the first approved public charter school for boys in the State of Georgia. We are a fully recognized tuition free public school serving South Fulton County, Atlanta, and North Clayton County. The focus of Fulton Leadership Academy is to prepare young men for collegiate studies and the pursuit of careers in areas of STEM (Science, Technology, Engineering and Mathematics) and/or Aviation. Our institution's current enrollment consists of approximately 300 Scholars in grades 6-12. Our plans are to increase

our enrollment to at least 500 by 2024. However, our efforts to expand and increase enrollment are often usurped by difficulties in funding. Fulton Leadership Academy is financially supported by the State of Georgia but does not receive local dollars. As a result, our financial allocation per student is less than that of the surrounding school districts. Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.

Fulton Leadership Academy has benefitted from the SCSC's commitment to expand charter opportunities in underserved communities and the guidance they provide ensures that charter schools are meeting local community needs. The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.

The Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a website to share information about charter schools with families and communities, including a charter school search engine. The CSP grant award will allow the SCSF to build on this website and other charter school communication efforts to increase engagement between charter schools and communities.

Fulton Leadership Academy thanks you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Mrs. Richardean Golden Anderson Superintendent Fulton Leadership Academy



August 3, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Genesis Innovation Academy for Boys and Genesis Innovation Academy for Girls strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A).

Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The CSP grand has been extremely beneficial to Genesis in the past and has played an integral role in supporting our efforts partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The CSP grand has been extremely beneficial to Genesis in the past and has played an integral role in supporting our efforts to serve the needs of our scholars. CSP allowed us to launch two single-gender charter schools. Without the grants, the start-up costs would likely have been unmanageable. Ideas, mission, vision, and models are all key components for viable charter schools. Without funding, however, ideas will often "die on the vine." Start-up is the most critical phase for a new charter school and CSP grants ensure new charters have a great opportunity to successfully navigate the start-up phase.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Gavin Samms, Ph.D. Head of Schools



Date: August 3, 2022

To: Dr. Anna Hinton Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Georgia Connections Academy is a virtual state charter school that serves students grades K-12. Grant funds are essential in the consideration of expansion for high-quality charter schools. The partnership between the SCSC, the state charter school authorizing entity, the GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows a strong commitment in supporting charter schools in Georgia. These funds would support their efforts in strengthening the quality of education and aid in the dissemination of best practices from charter schools across the state.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia.

With regards,

Brazilia Bilal-Page Executive Director Georgia Connections Academy

> 678-825-3258 2763 Meadow Church Road Suite #208 Duluth, GA 30096 www.georgiaconnectionsacademy.org



GEORGIA SCHOOL FOR INNOVATION AND THE CLASSICS

August 3, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Georgia School for Innovation and the Classics (GSIC) is a K-12 charter school located in Hephzibah, Georgia serving approximately 950 students. Since inception GSIC has been committed to excellence in serving students in and surrounding Richmond County throughout the Central Savannah River Area (CSRA). Using a refined and innovative model of classical education, GSIC has held to its commitment of accountability and excellence to both student/parent expectations and SCSC expectations, as evidenced in its CPF performance.

In our experience, the partnership between the SCSC, the GaDOE, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Furthermore, these grant funds are essential for high-quality charter schools like GSIC to consider replicating/expanding.

A key for GSIC is that we lie in an authorizer established geographic priority areas for opportunities (Augusta area) in underserved communities and meet local community needs. The support of grant funds will support us in aligning to the SCSC's new strategic plan which emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia. We intend for GSIC's commitment to excellence to continue with a GSIC-Augusta Replication. By leveraging the expertise and success of GSIC's administration, governing board, and strategic partners, GSIC-Augusta will be able to continue GSIC's mission to develop public K-12 schools of excellence rooted in foundational principles of a classical education that include partnerships with key civic, industry, and higher education entities to integrate classroom learning with the workplace. With both GSIC and GSIC-Augusta working in collaboration SCSC, SCSF, and others to reach their shared mission and vision, services will be centralized in a strategic partnership that will facilitate and extend high-quality educational options to students throughout the CSRA. Access to CSP funds will support that tremendously.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

Best regards,

Julie Hawkins Principal Georgia School for Innovation and the Classics



3705 Engineering Dr. Peachtree Corners, GA 30092 Tel: 770-604-0007 www.internationalcharteracademy.org info@internationalcharteracademy.org

August 3, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

International Charter Academy of Georgia is located in the city of Peachtree Corners, a Japanese dual language immersion school representing over 20 countries. ICAGeorgia is hoping to expand beyond elementary grades. Currently, no other schools in Georgia offer a Japanese immersion experience beyond grades K-5 and ICAGeorgia is hoping to expand to middle grades in the near future. During the start of the school in 2018, a CSP Grant was a major asset in helping ICAGeorgia have a successful start. Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Mrs. Jones Principal International Charter Academy of Georgia





August 1, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

On behalf of Ivy Preparatory Academy (Ivy), I am writing to express our board's support of an application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Ivy is located in Kirkwood located in southeast Atlanta. We serve girls in grades kindergarten through eighth. Our school focuses on developing the whole girl through our values of sisterhood, scholarship, and service. We are 100% Title I school. Our parents and guardians send us their very best and we are determined to consistently give them our very best. We have endeavored to take lessons learned and innovative practices to create actionable playbooks that will support the replication of Ivy as an educational institution. Grant funds are essential for high-quality charter schools to consider replicating and expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.

Thank you for your consideration of the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

The Right Choice for Girls,



RaShaun Kemp Chair, Governing Board

Ivy Preparatory Academy 1807 Memorial Drive SE Atlanta, Ga 30317 404) 622-2727 ivyinfo@ivyprepacademy.org www.ivyprepacademy.org

PR/Award # S282A220006 Page e620



Aug 3, 2022

Dr. Anna Hinton, Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Dear Dr. Hinton:

The Kindezi Schools strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The Kindezi Schools are a network of two charter schools and one partner school authorized by Atlanta Public Schools. We serve over 1200 students from across the Atlanta Public School attendance zone. Our mission is to provide <u>every child</u>—regardless of background, need, or identity–a holistic genius awakening education built on family-sized classrooms, conscious diversity, and scholarly excellence.



In previous years, we have utilized the CSP funds to support our students and teachers having access to high-quality 1:1 technology. This technology has included monitors, headsets, chromebooks, headphones with microphones, projectors, smart boards, tablets, docks, and technology carts. Technology is ever changing and always needed and CSP funds can always be used to support this need.

The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective. Additionally, the Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a website to share information about charter schools with families and communities, including a charter school search engine. The CSP grant award will allow the SCSF to build on this website and other charter school communication efforts to increase engagement between charter schools and communities.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Dr. Kelly M. Gunn Executive Director The Kindezi Schools



August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

In pursuit of equitable educational access for the scholars of Atlanta, Georgia, KIPP Metro Atlanta Schools made a commitment 18 years ago to open a single school in a depleted and marginalized community in the south of the city. What we learned in opening this school was parents longed for school choice in the city of Atlanta. KIPP Metro Atlanta Schools now has 11 schools throughout the city of Atlanta, serving over 5200 scholars, all deserving of access to excellence in every way. CSP funding is critical to this end. This proposed strategy would impact positively our potential to operate and innovate in ways that keep us from our promise and our purpose.

Currently, in Georgia it is extremely difficult to launch a charter school without the critical funding made available through the Federal Charter Schools Program Grant (CSP). While our schools in metro Atlanta are authorized through our local school district and county, we recognize that state funded charter schools will be severely underfunded and therefore impacted to the detriment of scholars and families statewide. This scenario creates a virtually impossible pathway for state authorized charters, as there has been a decrease in the number of district authorized charter schools. State charters will be at a significant competitive disadvantage for CSP funding, for which funds are critical to school operations. Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.

As families seek excellent schools, traditional or charter, The SCSC's new strategic plan emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia. Currently, our high school, KIPP Atlanta Collegiate, was just named one of the top charter high schools in the state of Georgia. With this proposed grant funding we dream and strategize of opening a new high school in Georgia to afford scholars an opportunity at a joyfully excellent academic experience.

Next, in order to continue the quest to form a "more perfect union" diversity has to be at the forefront for children and families to see that representation matters. In Georgia, charter and traditional in-district schools often match their surrounding communities and are NOT diverse in racial/ethnic makeup. The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

In service,



Crystal Nasir Chief Impact Officer KIPP Metro Atlanta Schools



August 1, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Miles Ahead Charter School (MACS) is an SCSC authorized school launching with a whole child approach to 21st century education. Located west of Atlanta, the students at MACS have the opportunity to attend a school with a mission focused on preparing them



with the digital and technology skills currently not available to them from other surrounding schools. The GEER II grant ensures Miles Ahead is able to execute this mission and provide greater options for Georgia's families. This partnership ensures MACS is able to:

- Collaborate with the SCSC to design and delivery a 21st century curriculum composed with computer literacy, digital citizenship courses, and coding as a second language.
- Serve students in a geographic priority area west of Metro Atlanta.
- Expand our impact to students' families and siblings as MACS scales to a Kindergarten through Eighth grade program.

Educating Georgia's children and preparing them for the future is the focus of MACS, and with supportive grants the SCSC, MACS, and other schools can continue to delivery on the promise of high-quality, public education. Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Kolt Bloxson School Founder Miles Ahead Charter School



Scot Hooper Superintendent

July 29th 2022 Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Odyssey Charter School received its state charter in 2001 making it one of the oldest charters in the state of Georgia. We have developed a respected program here in our community working with students who struggle in typical public school environments. During our last state test cycle, all of our special education students in 8th grade tested proficient or higher in all tested areas of the MileStone exams. This is an exceptional result, but not unusual for our students. We specialize in working with students who have undiagnosed learning disabilities.



Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully. Please help us continue these efforts for growth and expansion.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Scot Hooper Superintendent



PATAULA CHARTER ACADEMY Edison, GA

SPRING CREEK CHARTER ACADEMY Bainbridge, GA



July 29, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Sent via electronic mail: TSL@ed.gov

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Pataula Charter Academy and Spring Creek Charter Academy are two K-12 Commission Charter Schools in rural, southwest Georgia, who have and could highly benefit from this program. CSP grant funds were essential for Pataula to replicate its high-quality model by creating Spring Creek Charter. Further replications or expansions would not be possible without additional grant funds. Both schools are located in rural areas, have School-Wide Title I Programs, and serve over 60% FRL population. The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities like ours. The SCSC's new strategic plan emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia. We qualify under both of those categories. Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,



Kylie Holley Superintendent Pataula Charter Academy/Spring Creek Charter Academy



July 25, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Resurgence Hall Charter School strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Within a structured, joyful, and values-based school community, and with an absolute focus on academic achievement, Resurgence Hall Charter School educates every K-8

scholar for success in high school, college, and life. As a growing charter school seeking to expand its impact into rural Georgia, the CSP grant has and will continue to be of critical importance to support a strong start for our schools. Our first CSP grant allowed us to purchase essential technology, such as student chromebooks, classroom projectors, and tablets. We also utilized the funds for textbook purchases, professional development, and student furniture. Again, without access to CSP funds we would not have had the ability to purchase essential materials that our students needed.

The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!



Board Chair Resurgence Hall Charter School



August 3, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Scintilla Charter Academy (SCA) is a K-8 charter school located in Valdosta, Georgia serving approximately 700 students. The mission of Scintilla Charter Academy is to increase student achievement and develop social responsibility through educational

innovations in a safe community of involved families and educators. CSP funding was critical in our early success in implementing and stabilizing our school in the establishment of SCA. The funds were instrumental in procuring key resources to build the foundation for our highly accountable and successful model in place today that exceeds expectations on our performance framework as well as driving a robust waitlist. CSP, in the future, will serve to support our expansion to the next grade bands and continue to serve the students of south Georgia.

In our experience, the partnership between the SCSC, the GaDOE, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Furthermore, these grant funds are essential for high-quality charter schools like SCA to consider replicating/expanding.

A key for SCA is that we lie in authorizer established geographic priority areas for opportunities in underserved communities and meet local community needs. The support of grant funds will support us in aligning to the SCSC's new strategic plan which emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Mandy Brewington Superintendent Scintilla Charter Academy



July 29, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Scintilla Charter Academy (SCA), currently serving students in grades K-8, is located in Valdosta, Georgia. Expanding an additional grade level this year in the middle grades setting, the SCA: Middle School will serve 161 students across grades 6-8. With enrollment expansion, combined with recruitment efforts through strategically planned initiatives, the SCA: Middle School will serve 240 students at capacity. This number is significantly less than the number of students currently served in the 3-5 setting. Therefore, we aim to expand to incorporate enough high-quality faculty and staff to serve our current student population as they transition into the middle grade context. SCA's

2171 E. Park Ave., Valdosta, GA 31602 scintillachastesacademy.com

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geographic location in rural South Georgia, several hours away from larger towns, limits student potential in surrounding areas to engage in a high-quality educational experience characteristic of a charter setting. With increased community interest in equitable evidence-based learning opportunities for all and an ever-increasing number of students being served at the elementary level, SCA seeks to expand to afford more students the chance to experience a quality education. Additionally, SCA has a strategic vision to vertically align high-quality learning experiences for current students by expanding to include a high school. Grant funds are essential for SCA to expand high-quality teaching and learning opportunities, and Georgia is offering the technical assistance we will need to grow sustainably and successfully through expansion of current programming and added programming to include grades 9-12.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

Sincerely,

Jessica B. Graves, Ph.D.

Head of School: Middle Grades

Scintilla Charter Academy





Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This partnership will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

The mission of The Anchor School (TAS) is to be a village of families, educators, and community members that partners with 6th through 12th grade students who are developing the knowledge, skills, and confidence they need to thrive in school and beyond. TAS, an SCSC authorized school, plans to open with 6th grade in August of 2023. Our tuition-free public charter school plans to grow by one grade level per year, expanding over time to become a middle and high school. Utilizing design-thinking principles to include families and community members in the school design, TAS developed a cohesive and innovative school model that will support holistic adolescent development through strategic partnerships with families and community organizations, while delivering an excellent education through project-based learning.

Grant funds are essential for high-quality charter schools in their founding years, and Georgia is offering the technical assistance schools like ours need to grow sustainably and successfully. The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs. The SCSC's new strategic plan emphasizes the creation of new charter high schools, recognizing that this is an area of high need for Georgia.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

With regards,

Josh Pinto Taylor, Ed.D. co-founder, The Anchor School



Tybee Island Maritime Academy 714 Lovell Avenue PO Box 1519 Tybee Island, GA 31328 O: 912-395-4060 F: 912-201-2805

August 4, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Located outside of Savannah, GA on a barrier island, Tybee Island Maritime Academy (TIMA) is the only K-8 STEAM school in the region certified by the Georgia Department of Education, which includes Savannah-Chatham, Bryan, Effingham, Long, Glynn, and Liberty Counties. We are the only school on the island and provide a unique experience to students across Chatham County. At TIMA, our mission is to create a supportive, highly involved, learning community which will promote the highest academic achievement through a maritime, career focused, project-based curriculum centered on the natural and historical context of Tybee Island and the surrounding Savannah area. TIMA includes character-enrichment combined with a focus on skill development leading to successful career opportunities available in the Savannah area.

Having recently expanded from a K-5 to K-8 school with a limited footprint for facilities, constrained geographically by our island location, we are strong advocates of all support for growth. Our partnerships with the local district (SCCPSS) and our local island community have been critical to our success and growth. Our collaborative relationship with SCCPSS spans human resources, professional development, special education, and nutrition. These agreements are born out of both parties working together to improve services for students. The local island community is also a strong partner. The local public library serves as our students' primary library and we utilize gym and classroom space at the local YMCA. Using a place-based curriculum, the island acts as both teacher and classroom. On any given day, students are on the beach, using local parks, or taking a field trip to the Tybee Marine Science Center or the Burton 4-H Center.

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While we have been successful in our growth thus far, technical assistance and financial resources would be a tremendous help in supporting future growth for us and any charter school. Even with the deep support of the district and our community, we are under resourced and ask a lot of our faculty. We share space and work across multiple roles to keep the students growing and thriving. Our Governing Board has been fiscally focused on future sustainability for our school. Additional funds would allow a school like ours to expand our offerings to more students.

We are hopeful that the state of Georgia receives funding to expand innovative schools such as ours. We see tremendous growth in our students daily through their passion for their community, their engagement in rigorous thought projects, and in their kindness and collaboration with their peers.

Thank you,

Peter L. Ulrich

Principal

Tybee Island Maritime Academy

Dr. Artesius Miller Chief Executive Officer

Mr. Dale Smith Chief Financial Officer

Mr. Greg Leaphart Director of Operations

August 1, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. The partners will be continuing and expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Utopian Academy for the Arts is a free, high-performing, and growing public charter school network that serves elementary, middle, and high school students in metro Atlanta. Utopian's theory of change is outlined in our mission statement: Through a structured and supportive environment, the Utopian Academy for the Arts will develop academic and artistic students to enter and to succeed in the global society, with proficiency to enroll in a college, university or specialty school of their choice. Since 2013, our educational model has leveraged the positive effects of arts education to engage and inspire students, develop their academic and artistic potential, and prepare them to be leaders in their communities.

Through the federal CSP grant program, Utopian Academy for the Arts has thrice received financial support to cover the costs associated with necessary pre-operational and implementation expenses of a new charter school, including marketing and community outreach, professional development, salary and benefits for necessary staff to conduct pre-planning and preparations for the inaugural school year, teacher and student classroom furniture, curriculum resources, student assessment tools, technology, classroom instructional supplies, and costs associated with implementing a fiscally sound and robust start-up charter school.

As our organization seeks to expand impact and other charter petitioners seek to provide high quality charter school options for students of Georgia, we would like to remind your team of why the application from our state-level entities (SCSF, SCSC, and GaDOE) is critical towards the overall success and sustainability of future charter schools in our state.



Ms. Pamela Dingle Executive Director

Mrs. Ebonne Craft Director of Arts Education

> Mrs. Elisha Byers Director of Strategic Initiatives

Dr. Artesius Miller Chief Executive Officer

Mr. Dale Smith Chief Financial Officer

Mr. Greg Leaphart Director of Operations



Ms. Pamela Dingle Executive Director

Mrs. Ebonne Craft Director of Arts Education

> Mrs. Elisha Byers Director of Strategic Initiatives

- The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.
- Grant funds are essential for high-quality charter schools to consider replicating/expanding, and Georgia is offering the technical assistance schools need to grow sustainably and successfully.
- The SCSC has established geographic priority areas for charter petitions to expand opportunities into underserved communities and requires new schools to ensure that they are meeting local community needs.
- The SCSC's new strategic plan emphasizes charter school growth in rural communities and the creation of new charter high schools, recognizing that these are two areas of high need for Georgia.
- GaDOE provides ongoing support and technical assistance to charter school authorizers in Georgia and is offering a series of learning modules developed by the National Association of Charter School Authorizers (NACSA) that support the newly-adopted Georgia Charter School Authorizer Standards. These efforts will help all charter schools and continue to strengthen relationships between charter schools and their authorizers.
- The Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a website to share information about charter schools with families and communities, including a charter school search engine. The CSP grant award will allow the SCSF to build on this website and other charter school communication efforts to increase engagement between charter schools and communities.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!



Artesius Miller, Ph.D. Founder & CEO Utopian Academy for the Arts Charter School Network



. ZEST Preparatory Academy 12461 Veterans Memorial Hwy, Suite 613 Douglasville, GA 30134 www.zestprep.org

August 2, 2022

Dr. Anna Hinton Director Charter School Programs U.S. Department of Education, OESE 400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

We strongly support the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer high-quality education to Georgia's children. This grant will build upon the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

ZEST Preparatory Academy is a K-5 elementary charter school that will open to 216 students in August 2023. As a newly authorized charter school, grants and technical support offered by the CSP Grants are critical during our founding stages. The partnership between the SCSC, the state charter school authorizing entity, and GaDOE, the SEA, and the SCSF, the SCSC's foundation, shows the strong commitment to supporting charter schools in Georgia. Together, they will strengthen quality authorizing in our state, disseminate best practices from charter schools widely, and ensure that charter schools have the resources they need to be effective.

The Georgia Strategic Charter School Growth Initiative, as led by the SCSF, has created a website to share information about charter schools with families and communities, including a charter school search engine. The CSP grant award will allow the SCSF to build on this website and other charter school communication efforts to increase engagement between charter schools and communities. We know that families in our community of Douglas County, GA and surrounding areas will greatly benefit from this website. Our community stakeholders will now have a central location to learn about charter schools near them, the charter movement, and how they can get involved to strengthen the education of all the community's children.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

Monique Cartuthers Executive Director ZEST Preparatory Academy



Date: August 5, 2022 To: Dr. Anna Hinton, Director Charter School Programs U.S. Department of Education, OESE

400 Maryland Ave SW Washington, D.C. 20202

Re: FY 2022 CSP Grants to State Entities (84.282A)

Goodwill Southeast Georgia strongly supports the application from the State Charter Schools Foundation of Georgia (SCSF), State Charter Schools Commission of Georgia (SCSC), and the Georgia Department of Education (GaDOE) for the U.S. Department of Education's FY 2022 CSP Grants to State Entities (84.282A). Their proposed strategy to provide grants and technical assistance to new, replicating, and expanding charter schools will help ensure that community-based schools have the support they need to offer highquality education to Georgia's children. The partners will continue expanding the existing Georgia Strategic Charter School Growth Initiative, which was established to provide intensive technical assistance and grants to new, replicating, and expanding charter schools through a GEER II grant.

Since 1965, Goodwill Southeast Georgia has supported 29 counties in coastal Georgia, headquartered in Savannah, through innovative workforce development initiatives designed to assist individuals in growing to their highest potential. The mission of Goodwill is to assist people with disabilities and other barriers to employment to live independently and become employed. Georgia needs high-quality school options for young people and their families to enter the workforce ready to land good jobs that lead to independence and self-sufficiency. Through support, education, training, and employment initiatives, those in our community continue to thrive. Goodwill supports the State Charter School Commission's endeavor to provide high-quality education to families in Georgia. The Charter School Program Grant will help the SCSC ensure all students can enroll in great schools.

Thank you for your consideration of this proposal to provide financial and technical support to new, replicating, and expanding charter schools in Georgia!

Warm Regards,

Meredith Champagne, Director of Mission Project and Compliance Goodwill Southeast Georgia

Changing lives through the power of work.

Budget Narrative File(s)

* Mandatory Budget Narrative Filename:	1242-Georgia - Part 5 -	Budget Narrative - CSP Stat
Add Mandatory Budget Narrative Delet	te Mandatory Budget Narrative	View Mandatory Budget Narrative

To add more Budget Narrative attachments, please use the attachment buttons below.

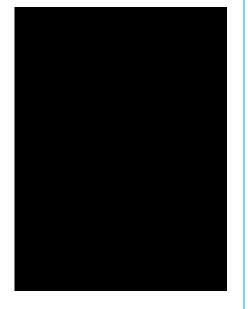
Add Optional Budget Narrative	Delete Optional Budget Narrative	View Optional Budget Narrative

GEORGIA STRATEGIC CHARTER SCHOOL GROWTH INITIATIVE

A PROPOSAL FOR FY2022 CSP GRANTS TO STATE ENTITIES

Presented by the State Charter Schools Foundation of Georgia

PART 5: BUDGET NARRATIVE











PR/Award # S282A220006 Page e646

This CSP State Entity Grant proposal is presented by the State Charter Schools Foundation of Georgia (SCSF), the lead applicant/fiscal agent and nonprofit statewide charter school support entity; the Georgia Department of Education (GaDOE), the state educational agency (SEA); and the State Charter Schools Commission of Georgia (SCSC), the state's independent charter school authorizing board. The applicants are proposing to expand and continue the Georgia Strategic Charter School Growth Initiative, an effort established with GEER II funds in 2022 to support the creation, expansion, and replication of high-quality charter schools in underserved communities. The initiative features a combination of subgrants with technical assistance to give charter schools the greatest chance for success. In addition, the expanded Georgia Charter Growth Initiative will include technical assistance and training for charter school authorizers related to the newlyadopted Georgia authorizer standards and the collection and dissemination of charter school best practices to struggling schools. The Year 1 budget is lower than following years since some activities are partially funded by GEER II funds that will expire September 2023. GEER II funds were intended to launch but not sustain the Georgia Strategic Charter School Growth Initiative, and this budget represents expenses not covered by GEER II.

Subgrants (Other Budget Line Item)

Subgrants will be awarded to charter schools on a competitive basis with a range of

based on the subgrant applicant's plans, location, and grade band. A total of **over five years is budgeted for subgrants, all to have 3-year terms.** New and replicating schools and schools planning high school expansions will also be eligible for a 1-year planning grant of **to assist with planning activities and related personnel expenses.** Total grant expenditures in Year 1 will be slightly lower than subsequent years since the Georgia Charter Growth Initiative begins its current Replication and Expansion Cohort and Grant Program in August 2022, and its New School Leader Fellowship Program in August 2022. The next grant/cohort application will open in February 2023, utilizing CSP funds for grants and technical assistance starting in summer 2023 (still federal FY2023). In addition, the co-applicants anticipate awarding subgrants to schools that are ready to open, replicate, or expand without technical assistance in Year 1 and following years.

New start-up school and replication subgrantees will be eligible for a base grant award of for implementation expenses, including supplies, furniture, curriculum, consultant fees, one-time start-up expenses, etc. This amount was determined based on the budgets of new and replicating schools provided to the co-applicants, demonstrating significant financial need to open a new school. In addition, replication and start-up charter school subgrantees will receive a planning grant of for additional expenses like personnel expenses directly related to the school planning and opening.

New and replicating schools in rural areas and high schools will be eligible for an additional supplement of **to** reflect the additional costs incurred by these schools and to incentivize the creation of more charter schools in rural communities and more charter high schools.

Schools expanding into a new grade band or adding at least 100 new seats will be eligible for a base subgrant of **Schools**. Schools expanding into high school will be eligible for a subgrant of **School**, plus a planning grant of **School** to reflect the extreme costs of preparing for and opening a high school. In Georgia, high schools receive the least amount of state-provided perpupil funding. They also must offer a wide variety of courses, seek accreditation expeditiously, and provide facilities that are appropriate for high school activities and studies. Charter Growth Initiative p. 4

Anticipated Subgrant Awards

Yea	Year 1		ar 2	Year 3		Ye	ar 4	Yea	ar 5
Ν	R/X	Ν	R/X	Ν	R/X	Ν	R/X	Ν	R/X
2	4	2	4	2	5	2	4	2	5
N=New Start	N=New Start-up Charter Schools, R/X=Replication or Expansion Charter Schools								

w school				
plication				
pansions - new				
le band				
nsion - 100+				
seats from				
nodified				
r				
nsion high				
Replication				
School or Rura				
l Supplement				

Personnel (Admin)

All personnel expenses in this CSP State Entity Grant budget are administrative expenses. No Fringe Benefits are being claimed for this grant, and all entities agree to absorb the costs of fringe benefits. In addition, the Program Director is being provided at 50% of her time as an inkind contribution, and several other team members will be provided by their respective entities at no charge to the Initiative.

Personnel			
GaDOE Director			
Program Coordinator			
SCSC Monitoring			

- The GaDOE Director will be leading the technical assistance and training program for authorizer standards and collecting, recording, and disseminating charter school best practices for struggling schools.
- The SCSF's Program Coordinator is responsible for subgrant administration, payment processing, the application process, reporting to USEd, and general program administration. She will work in coordination with the contractor for financial services to ensure that all financial transactions are recorded appropriately. In Year 1, 60% of the Program Coordinator's compensation is paid by GEER II funds. With the expansion of the Georgia Charter Growth Initiative, the Program Coordinator will spend 100% of her time on this initiative. There is a compensation escalation of beginning in Year 3, to ensure personnel retention in this very critical role.

Charter Growth Initiative p. 6

The SCSC Monitor will spend 100% of their time performing subgrant monitoring activities for the Georgia Charter Growth Initiative.
 represents a competitive salary for a full-time employee, who will start in Year 1 building the monitoring program. All activities will be closely coordinated with other SCSC charter school monitoring activities.

Travel (Admin)

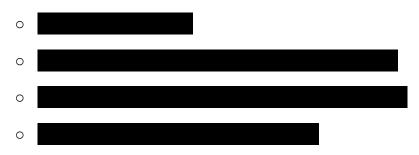
Each of the co-applicants will engage in travel activities to carry out their duties and responsibilities according to the grant proposal. The line items for travel for GaDOE, SCSF – state, and the SCSC will be travel within the State of Georgia via motor vehicle. The line item of SCSF-Conf represents the expenses budgeted to attend the national CSP Conference in Washington D.C. for the Program Director and Program Coordinator.

• No statewide travel is budgeted for the SCSF for Year 1 because anticipated travel is already planned and expenses for this initiative will be paid by GEER II funds through

Travel		
GaDOE		
SCSF - Conf		
SCSF - State		
SCSC		

September 2023.

• The travel expenses to attend the conference were based on two people:



- State travel expenses were based on the average cost of a rental car at day, and an average cost of gas at day, and the anticipated locations of Macon, Albany, Dalton, Columbus, Metro Atlanta, and various charter schools.
 - Limited overnight travel is expected at 2 nights per team entity per year,
 - GaDOE will travel to promote the authorizer standards and provide training and to collect and disseminate charter school best practices.
 - The SCSF will travel to participate in community charter school information meetings and to provide onsite technical assistance for subgrantees.
 - The SCSC will travel to monitor subgrantees, provide onsite technical assistance, and participate in community charter school information meetings (travel will be done together with the SCSF whenever possible to minimize expenses).

Supplies (Admin)

The co-applicants anticipate limited supply needs in order to carry out the activities of the Georgia Charter Growth Initiative under the CSP grant.

GaDOE SCSF SCSC	SCSF	Supplies		
SCSF	SCSF			

- GaDOE will purchase general office supplies to carry out their responsibilities under the CSP grant.
- The SCSF will purchase a software license to assist with grant management. The SCSF is considering several options that are averaging per year. Additional budgeted funds

will be used for the purchase of general office supplies used exclusively by the Program Coordinator for activities under the CSP grant.

• The SCSC will purchase a portable scanner for **under the first year to use for onsite** monitoring. Additional funds will be used for an additional license of monitoring software used by the SCSC for **under the SCSC for** per year. Remaining funds will be used to purchase general office supplies for the Monitoring Lead for activities under the CSP grant.

Contracts

The Georgia Charter Growth Initiative will contract with several entities to provide program-related and administrative services. Year 1 expenses are lower because cohort-based technical assistance is already underway and under contract through September 2023, when contracts and existing funding expire. The timeline allows the co-applicants time to solicit and select new subgrantee applicants through a robust process and ensure that all eligible schools are aware of opportunities.

Replication/Expansion TA			
Facility-Finance/Incubator TA			
New School Leader Fellowship			
Authorizer Standards TA			
Charter School Best Practices			
Accounting Services (admin)			

• TA Activities: A contract will be executed with Bellwether Education Partners (or other organization after following the SCSF's federal program procurement process) to provide a 4-month replication and expansion cohort experience for subgrantees. The annual amount is based on 4 participating schools per year at a rate of per school, which is

commensurate with the fees currently being paid under the GEER II grant for the same services.

- TA Activities: A contract will be executed with the Georgia Charter Schools Association (or other organization after following the SCSF's federal program procurement process) to provide 12 months of services through their Facility Resource Center (facility and finance consulting customized for the schools) and Incubator program (petition preparation and other implementation support). The annual amount is based on 4 participating schools per year at a rate of per school, which is commensurate with the fees currently being paid under the GEER II grant for the same services.
- TA Activities: A contract will be executed with Lead with Excellence (or other organization after following the SCSF's federal program procurement process) to offer a 12-month new school leader fellowship program to support new charter school leaders as they plan every detail of their school community, culture, academics, and schedule. The annual amount is based on 4 participating schools per year at a rate of per school, which is commensurate with the fees currently being paid under the GEER II grant for the same services.
- TA Activities: A contract will be executed with the National Association for Charter School Authorizers (or other organization after following GaDOE's procurement process) to create and provide online learning modules for Georgia charter school authorizers, other technical assistance, and authorizer evaluations. The annual amount is commensurate with similar contracts executed previously.
- TA Activities: A contract will be executed with an entity following GaDOE's procurement process to create and provide an online toolkit to disseminate charter school best practices

for schools in Georgia, with a focus on struggling schools. The annual amount is commensurate with similar contracts executed previously.

• Admin Activities: The SCSF will expand its current contract with Doug Erwin, a contractor who provides financial services to the SCSF (or other organization after following the SCSF's federal program procurement process), to provide accounting and related services specifically for CFO and financial reporting for the CSP grant and related activities. The fee structure is based on fees currently being paid to Mr. Erwin under a separate contract. Fees escalate by year to account for the increase in financial activities related to the CSP grant and the need for extensive final reporting on the last year. At a rate of per hour, Mr. Erwin will provide 150 hours of service in years 2-4, representing an average of 12.5 hours per month. An additional 50 hours is budgeted for Year 5 for additional reporting requirements. Since the SCSF budgets general operating funds for other related accounting services, Quickbooks license, and preparation of monthly and annual reports (such as the IRS form 990), funds budgeted in this category are adequate. The budgeted amount will also be applied towards the completion of a single audit.

*This budget is not requesting indirect costs.

U.S. Department of Education

Grant Application Form for Project Objectives and Performance Measures Information

See Instructions.

Applicant Information

Legal Name:

State Charter Schools Foundation of Georgia, Inc.

1. Project Objective:

Support the replication, expansion, or creation of 32 high-quality charter schools that are responsive to community need in Georgia with technical assistance and grants, including a new school leader fellowship and a replication cohort program.

			Quantitative Data	
1.a. Performance Measure	Measure Type	Target		
		Raw Number	Ratio	%
Open, expand, or replicate at least 32 high-quality charter schools in Georgia by 2027.	PROJECT	32	1	

			Quantitative Data	
b. Performance Measure Measure Type		Target		
		Raw Number	Ratio	%
At least 10 new, expanded, or replicated charter schools will be located in rural communities or SCSC priority communities as a part of the CSP grant by 2027.	PROJECT	10	1	

			Quantitativ	ve Data	
1.c. Performance Measure	Measure Type	a Target			
		Raw Number	Rati	0	%
At least 4 schools will open a new charter high school, replicate into high school, or expand into high school munities as a part of the CSP grant by 2027.	PROJECT	4	1		

		Quantitative Data			
1.d. Performance Measure	Measure Type	Target			
		Raw Number	Ratio	%	
Hold at least 2 virtual informational meetings about the Georgia Charter Growth Initiative for prospective schools	PROJECT	б	1		
Y1-5: Hold at least 4 in-person meetings in priority communities, including rural communities and charter middle schools (discuss high school)					

Funding Opportunity Number: ED-GRANTS-070622-001 Received Date: Aug 05, 2022 05:29:39 PM EDT

U.S. Department of Education Grant Application Form for Project Objectives and Performance Measures Information

			Quantitative Data	
1.e. Performance Measure	ure Measure Type Target		Target	
		Raw Number	Ratio	%
At least 2 new approved schools participate in the New School Leader Fellowship program each program year (years 2-5)	PROJECT	2	1	

			Quantitative Data	
1.f. Performance Measure	Measure Type	Target		
		Raw Number	Ratio	%
At least 4 existing high-quality charter schools participate in Replication & Expansion cohort program each program year (years 2-5)	PROJECT	4	1	

1.g. Performance Measure		Quantitative Data					
	Measure Type		Target				
		Raw Number	Ratio	%			
90% of subgrantees agree that the subgrant process is efficient, accurate, and timely, avoiding duplication in the submission process; 90% of subgrantees agree	PROJECT		90 / 1	00 90.00			
that they are not required to provide the same reports or information related to the subgrant to more than one entity							

2. Project Objective:

Educate and engage communities across Georgia about charter schools with convenings and a comprehensive charter school website (FindaGaCharter.org).

		Quantitative Data				
2.a. Performance Measure	Measure Type	e Target				
		Raw Number	Ratio	%		
At least 10 charter schools will report increased enrollment interest and/or applications from charter school communications efforts by 2027.	PROJECT	10	1			

2.b. Performance Measure		Quantitative Data					
	Measure Type	De Target					
		Raw Number	Ratio		%		
Traffic to FindaGaCharter.org will increase by at least 25% a year after the first year, as measured by Google Analytics (years 2-5).	PROJECT		25 /	100	25.00		

2.c. Performance Measure	Measure Type	Quantitative Data				
		Target				
		Raw Number	Ratio	%		
At least 2 new communities without a charter school within 20 miles will have charter petitions submitted by 2027.	PROJECT	2	1			
Page e657						

U.S. Department of Education Grant Application Form for Project Objectives and Performance Measures Information

2.d. Performance Measure		Quantitative Data				
		Target				
		Raw Number	Ratio	%		
Hold at least 2 virtual informational meetings about the charter schools for communities and parents; hold at least 4 in-person meetings in priority communities,	PROJECT	2	1			
including rural communities and meet with stakeholders (years 1-5, annual)						
			Quantitative Data			
2.e. Performance Measure	Measure Type	Target				
		Raw Number	Ratio	%		
Hold at least 2 charter sector meetings with charter school support organizations to coordinate efforts in communities and share information to best meet community need	PROJECT	2	1			
(years 1-5, annual)		1				

3. Project Objective:

Promote consistent, quality charter school authorizing by providing technical assistance to authorizers, engaging in evaluations of practices, and supporting the Georgia Principles and Standards for Charter School Authorizing.

3.a. Performance Measure		Quantitative Data					
	Measure Type	e Target					
		Raw Number	Ratio		%		
At least 60% of charter school authorizers will access online training modules related to quality charter school authorizing by 2027.	PROJECT		60	1	100	60.00	

3.b. Performance Measure		Quantitative Data					
	Measure Type		Target				
		Raw Number	Ratio	%			
At least 70% of charter school authorizers will maintain high ratings or improve their rating on the authorizer evaluations.	PROJECT		70 / 100	70.00			

3.c. Performance Measure		Quantitative Data					
	Measure Type	pe Target		et			
		Raw Number	Rati	0	%		
Hold at least 2 live virtual sessions on using the training modules and other topics related to charter school authorizing annually, years 1-5.	PROJECT	2	1				

U.S. Department of Education Grant Application Form for Project Objectives and Performance Measures Information

3.d. Performance Measure		Quantitative Data				
	Measure Type		Targe	t		
		Raw Number	Ratio)	%	
Send at least 4 emails to charter schools about the authorizer evaluation process and schools' options if authorizers do not meet standards annually, years 1-5	PROJECT	4	1			

4. Project Objective:

Disseminate charter school best practices and offer additional support to high-need public schools, including charter schools and local district schools, with an emphasis on supporting TSI, ATSI, and Promise schools.

4.a. Performance Measure	Measure Type	Quantitative Data				
		e Target				
		Raw Number	Ratio	%		
At least 20 new best practices from charter schools will be added to REL-SE Virtual Toolkit to support struggling schools by 2027.	PROJECT	20	1			

4.b. Performance Measure		Quantitative Data					
	Measure Type Target		get				
		Raw Number	Ratio	b	%		
At least 10 struggling schools will access the Virtual Toolkit to identify best practices to improve their school community by 2027.	PROJECT	10	1				

4.c. Performance Measure		Quantitative Data					
	Measure Type	Target					
		Raw Number	Rati	0	%		
Identify at least 4 best practices at charter schools that are especially impactful for high-need students related to wellbeing and/or academic achievement and document		4	1				
at least 4 charter school best practices with sufficient detail for other schools to replicate the practices annually, years 1-5.							

INSTRUCTIONS GRANT APPLICATION FORM FOR PROJECT OBJECTIVES AND PERFORMANCE MEASURES INFORMATION

PURPOSE

Applicants must submit a **GRANT APPLICATION FORM FOR PROJECT OBJECTIVES AND PERFORMANCE MEASURES INFORMATION** via Grants.gov or in G5 when instructed to submit applications in G5. This form collects project objectives and quantitative and/or qualitative performance measures at the time of application submission for the purpose of automatically prepopulating this information into the U.S. Department of Education's (ED) automated Grant Performance Report form (ED 524B), which is completed by ED grantees prior to the awarding of continuation grants. Additionally, this information will prepopulate into ED's automated ED 524B that may be required by program offices of grant recipients that are awarded front loaded grants for their entire multi-year project up-front in a single grant award, and will also be prepopulated into ED's automated ED 524B for those grant recipients that are required to use the ED 524B to submit their final performance reports.

GENERAL INSTRUCTIONS

Applicant Information

• Legal Name: The legal name of the applicant that will undertake the assistance activity will prepopulate from the Application Form for Federal Assistance (SF 424 Form). This is the organization that has registered with the System for Award Management (SAM). Information on registering with SAM may be obtained by visiting www.Grants.gov.

Project Objectives Information and Related Performance Measures Data

Your grant application establishes project objectives stating what you hope to achieve with your funded grant project. Generally, one or more performance measures are also established for each project objective that will serve to demonstrate whether you have met or are making progress towards meeting each project objective.

• **Project Objective:** Enter each project objective that is included in your grant application. When completing this form in Grants.gov, a maximum of 26 project objectives may be entered. Only one project objective should be entered per row. Project objectives should be numbered sequentially, i.e., 1., 2., 3., etc. If applicable, project objectives may be entered for each project year; however, the year to which the project objective applies must be clearly identified as is presented in the following examples:

1. Year 1. Provide two hour training to teachers in the Boston school district that focuses on improving test scores.

2. Year 2. Provide two hour training to teachers in the Washington D.C. school district that focuses on improving test scores.

• **Performance Measure:** For each project objective, enter each associated quantitative and/or qualitative performance measure. When completing this form in Grants.gov, a maximum of 26 quantitative and/or qualitative performance measures may be entered. There may be multiple quantitative and/or qualitative performance measures associated with each project objective. Enter only one quantitative or qualitative performance measure per row. Each quantitative or qualitative performance measure that is associated with a particular project objective should be labeled using an alpha indicator. Example: The first quantitative or qualitative performance measure associated with project objective "1" should be labeled "1.a.," the second quantitative or qualitative performance measure for project objective "1" should be labeled "1.b.," etc. If applicable, quantitative and/or qualitative performance measures may be entered for each project year; however, the year to which the quantitative and/or qualitative performance measures apply must be clearly identified as is presented in the following examples:

1.a. **Year 1.** By the end of year one, 125 teachers in the Boston school district will receive a two hour training program that focuses on improving test scores.

2.a. **Year 2.** By the end of year two, 125 teachers in the Washington D.C. school district will receive a two hour training program that focuses on improving test scores.

- **Measure Type:** For each performance measure, select the appropriate type of performance measure from the drop down menu. There are two types of measures that <u>ED</u> may have established for the grant program:
 - 1. **GPRA:** Measures established for reporting to Congress under the Government Performance and Results Act; and
 - 2. PROGRAM: Measures established by the program office for the particular grant competition.

In addition, you will be required to report on any project-specific performance measures (**PROJECT**) that you established in your grant application to meet your project objectives.

In the Measure Type field, select one (1) of the following measure types: GPRA; PROGRAM; or PROJECT.

• Quantitative Target Data: For quantitative performance measures with established quantitative targets, provide the target you established for meeting each performance measure. Only quantitative (numeric) data should be entered in the Target boxes. If the collection of quantitative data is not appropriate for a particular performance measure (i.e., for **qualitative** performance measures), please leave the target data boxes blank.

The Target Data boxes are divided into three columns: Raw Number; Ratio, and Percentage (%).

For performance measures that are stated in terms of a single number (e.g., the number of workshops that will be conducted or the number of students that will be served), the target data should be entered as a single number in the **Raw Number column** (e.g., **10** workshops or **80** students). Please leave the **Ratio and Percentage (%) columns** blank.

For performance measures that are stated in terms of a percentage (e.g., percentage of students that attain proficiency), complete the **Ratio column**, and leave the **Raw Number and Percentage (%) columns** blank. The **Percentage (%)** will automatically calculate based on the entered ratio. In the **Ratio column** (e.g., **80/100**), the numerator represents the numerical target (e.g., the number of students that are expected to attain proficiency), and the denominator represents the universe (e.g., all students served).

U.S. DEPARTMENT OF EDUCATION BUDGET INFORMATION NON-CONSTRUCTION PROGRAMS

OMB Number: 1894-0008 Expiration Date: 09/30/2023

Name of Institution/Organization

State Charter Schools Foundation of Georgia, Inc.

Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.

SECTION A - BUDGET SUMMARY U.S. DEPARTMENT OF EDUCATION FUNDS

Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year 4 (d)	Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
1. Personnel	-							
2. Fringe Benefits	_							
3. Travel								
4. Equipment								
5. Supplies	-							
6. Contractual								
7. Construction								
8. Other								
9. Total Direct Costs (lines 1-8)								
10. Indirect Costs*								
11. Training Stipends	~							
12. Total Costs (lines 9-11)	α							
(/	nation (To Be Comp	leted by Your Busin	ess Office): If you ar	e requesting reimburs	ement for indirect cos	ts on line 10, please a	answer the following q	uestions:
(1) Do you have a	an Indirect Cost Rate	Agreement approved	by the Federal govern	ment? Yes	No			
(2) If yes, please	provide the following	information:						
Period Cove	ered by the Indirect Co	ost Rate Agreement:	From:	To:	(mm/dd/yy	yy)		
Approving F	ederal agency:	ED Other (ple	ease specify):					
The Indirect	Cost Rate is	%.						
			approved indirect cost the de minimis rate of					l under a training rate ts of 2 CFR § 200.414(f).
(4) If you do not h		Ũ	ent, do you want to us ed indirect cost rate ag		0	0	equired by 34 CFR §	75.560.
(5) For Restricted			ng a restricted indirect	-			. , .	
()	uded in your approved	, ,	°	Complies with 34 CFR	76.564(c)(2)?	The Restricted Indirec	t Cost Rate is	%.
	Rate Programs (check		a rate that:]
., .	- ·	, , ,	C (See EDGAR § 75.56	PR/Award # S282A2652(c)(4))? Or,Page e662 ti	SARRUded in your app raining rate of 8 perce	roved Indirect Cost Random Karley Reprint of MTDC (See EDC	ate Agreement, becau GAR § 75.562(c)(4))?	use it is lower than the
ED 524					3	- (5 (-/(-//)	

Funding Opportunity Number: ED-GRANTS-070622-001 Received Date: Aug 05, 2022 05:29:39 PM EDT

Name of Institution/Organization Applicants requesting funding for only one year									
State Charter Schools Foundation of Georgia, Inc.					should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.				
	SECTION B - BUDGET SUMMARY NON-FEDERAL FUNDS								
Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Year (d)		Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
1. Personnel									
2. Fringe Benefits									
3. Travel									
4. Equipment									
5. Supplies									
6. Contractual									
7. Construction									
8. Other									
9. Total Direct Costs (lines 1-8)									
10. Indirect Costs									
11. Training Stipends									
12. Total Costs (lines 9-11)									
SECTION C - BUDGET NARRATIVE (see instructions)									
ED 524									

Name of Institution/Organization State Charter Schools Foundation of Georgia, Inc.				Applicants requesting funding for only one year should complete the column under "Project Year 1." Applicants requesting funding for multi-year grants should complete all applicable columns. Please read all instructions before completing form.					
	IF APPLICABLE: SECTION D - LIMITATION ON ADMINISTRATIVE EXPENSES								
Budget Categories	Project Year 1 (a)	Project Year 2 (b)	Project Year 3 (c)	Project Yo (d)		Project Year 5 (e)	Project Year 6 (f)	Project Year 7 (g)	Total (h)
 Personnel Administrative Fringe Benefits Administrative Travel Administrative Travel Administrative Contractual Administrative Construction Administrative Other Administrative Other Administrative Total Direct Administrative Costs (lines 1-6) Indirect Costs Total Administrative Costs Total Percentage of Administrative Costs 	-								

ED 524

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C.1352

OMB Number: 4040-0013 Expiration Date: 02/28/2025

1. * Type of Federal Action:	2. * Status of Federal Ac	tion: 3. * Report Type:				
a. contract	a. bid/offer/application	a. initial filing				
b. grant	b. initial award	b. material change				
c. cooperative agreement	c. post-award					
d. Ioan e. Ioan guarantee						
f. loan insurance						
	F ==4:4					
4. Name and Address of Reporting	Entity:					
* Name State Charter Schools Foundation of						
* Street 1 205 Jesse Hill Jr. Dr. SE	Street 2	Suite 504				
* City Atlanta	GA: Georgia	Zip 30334-9033				
Congressional District, if known:						
5. If Reporting Entity in No.4 is Subay	vardee, Enter Name and A	Address of Prime:				
6. * Federal Department/Agency:	7.*	Federal Program Name/Description:				
US Department of Education	[ter Schools				
		DA Number, <i>if applicable:</i> 84.282				
8. Federal Action Number, if known:	9.4	Award Amount, if known:				
Michele	\$					
10. a. Name and Address of Lobbying						
		e Name				
Prefix * First Name N/A No lobb	ying activities					
* Last Name No lobbying activities		Suffix				
* Street 1 N/A No lobbying activities	Street 2					
* City N/A No lobbying activities	State GA: Georgia	Zip				
b. Individual Performing Services (inclu	iding address if different from No. 10a)					
Profix * First Name	Middle	e Name				
N/A no lobi	ying activities					
*Last Name N/A no lobbying activities Suffix						
* Street 1 N/A No lobbying activities	Street 2					
* <i>City</i> N/A no lobbying activities	State GA: Georgia	Zip				
		closure of lobbying activities is a material representation of fact upon which closure is required pursuant to 31 U.S.C. 1352. This information will be reported to				
the Congress semi-annually and will be available for \$10,000 and not more than \$100,000 for each such fa		file the required disclosure shall be subject to a civil penalty of not less than				
* Signature: Michele Neely						
*Name: Prefix * First Nam	e Mighele	Middle Name				
* Last Name	Michele					
Neely						
Title: President	Telephone No.:	Date: 08/05/2022				
Federal Use Only:		Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)				

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