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# New School Development

A Toolkit for Charter  
Support Organizations &  
Charter School Founders

## Prepared for



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CHARTER SCHOOL  
RESOURCE CENTER  
AT SAFAL PARTNERS

The National Charter School Resource Center (NCSRC, [www.charterschoolcenter.ed.gov](http://www.charterschoolcenter.ed.gov)) is dedicated to supporting the development of high-quality charter schools. The NCSRC provides technical assistance to sector stakeholders and has a comprehensive collection of online resources addressing the challenges charter schools face. The website hosts reports, webinars, and newsletters focusing on facilities, funding opportunities, authorizing, English learners, special education, military families, board governance, and other topics. The NCSRC is funded by the U.S. Department of Education and led by education consulting firm Safal Partners.

## Prepared by:



Safal Partners ([www.safalpartners.com](http://www.safalpartners.com)) a mission-driven strategy consulting firm that supports education reform efforts at the federal, state, district, and school levels.

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# Introduction



**Charter schools now serve an estimated 3.1 million students across 44 states and the District of Columbia.**<sup>1</sup> In Fall 2016, estimated charter school enrollment increased by over 200,000 students, a seven percent increase from the previous year. This increase was higher than the overall change in public school enrollment, estimated by the federal government to be just over 100,000, indicating more families are choosing charter schools. However, in conjunction with this growth, the charter sector saw approximately two schools close for every three that were opened. Today's charter school closures can be construed as evidence of previous decisions to open new charter schools that were not in a position to succeed. Strengthening charter school “front-end” capacity is an effective strategy to improve the overall quality of charter schools.

A study conducted by the Center for Research on Education Outcomes (CREDO) at Stanford University on 167 charter management organizations (CMOs) and 1,372 of their schools found that school performance within the first five years of operation is indicative of later performance.<sup>2</sup>

Using the first available performance measures as a baseline, CREDO determined 94 percent of schools that begin in the top quintile remain there through their fifth year while 80 percent of schools in the bottom quintiles of performance remain low performers. Therefore, by targeting the front-end of a charter's lifecycle, charter support organizations (CSOs) can help founding groups improve their charter application and start-up plan, avoid common pitfalls, expand their support network, and ultimately increase the charter school's likelihood of growing into a mature and successful school.

Among CSOs, there is clear interest in expanding upon, or improving, their new school development (NSD) services and, within the world of CSOs (and other support organizations), there is a large supply of publicly available NSD tools and templates. However, not every CSO has the budget or capacity to offer NSD service. In response to these challenges, the National Charter School Resource Center (NCSRC) has designed a navigational toolkit that contains publicly available NSD resources from across the country. These NSD resources focus primarily on supporting founding groups during Phase I – Planning, and Phase II – Startup of a charter school's life cycle.<sup>3</sup> Combining publicly available resources into a single toolkit helps CSOs in different ways. For CSOs already providing NSD support, anything directing them toward best available resources and information strengthens their capacity. For smaller states, where only a few charter applications are submitted each year, CSOs face less demand and greater staffing constraints.

1 The National Alliance for Public Charter Schools. (2017). [Estimated Charter Public School Enrollment, 2016-17](#). Washington, D.C.

2 Peltason, E. H., & Raymond, M. E. (2013). [Charter school growth and replication: Volume I](#). Stanford, CA: Center for Research on Education Outcomes at Stanford University.

3 Friends of Choice in Urban Schools. (2014). [D.C. Public Charter School Operations Manual 3rd Edition](#). Washington, D.C.

For CSOs working within these limitations, our toolkit provides a one-stop shop for actionable resources that can be shared with founding groups. Founding groups can use this toolkit to research CSO NSD services, find advice from charter school founders, and explore NSD resources to strengthen their understanding of what it takes to open a new charter school.

# Methodology



This toolkit was developed with four main sources of data: interviews with experts at state-wide CSOs that support NSD, questionnaire responses from charter school founders, reports from the National Alliance for Public Charter Schools (National Alliance), and research on NSD resources.

## Charter Support Organizations and Charter School Founders

The first round of interviews for this toolkit was conducted with experts in the field of NSD from the following state-wide organizations: Arizona Charter Schools Association, Colorado League of Charter Schools, and Texas Charter Schools Association. The goal of our first round of interviews was to gain perspective from CSOs in states that have a high demand for NSD services. The second round of interviews was conducted with CSOs from across the nation to gain a better understanding of the national NSD landscape. The states in the second round of interviews include Charter School Development Center (CA), Illinois Network of Charter Schools, Maine Association for Charter Schools, Maryland Alliance of Public Charter Schools, Ohio Alliance for Public Charter Schools, and Utah Association of Public Charter Schools.

During interviews, CSOs were asked to share a questionnaire with charter school founders. The questionnaire included six questions (listed below) and asked respondents to provide advice to founding groups on different NSD focus areas. Quotes from this questionnaire have been incorporated throughout this toolkit.

## Charter School Founder Questions

1. What general advice would you give to founding groups?
2. What advice would you give to founding groups related to Community and Parent Engagement?
3. What advice would you give to founding groups related to Financial Management and Oversight?
4. What advice would you give to founding groups related to Operations and Compliance?
5. What advice would you give to founding groups related to Organizational Leadership and Governance?
6. What advice would you give to founding groups related to School Culture and Academics?



## State and Organizational Profiles

To construct state profiles with charter growth data, we used the National Alliance's report, [\*Estimated Charter Public School Enrollment, 2016-17\*](#). To construct organizational profiles, we collected information on CSOs from their website and through our interviews.

## New School Development Resources

NSD resources were collected directly from CSOs, charter school websites, and general NSD Guides (listed in [Section II](#)). Resources were first checked for quality and relevance to the topic of NSD. Resources that contained outdated materials or broken links were removed. Resources were then categorized and organized into an accompanying Excel spreadsheet ([New School Development Resources 2017.xlsx](#)). This spreadsheet will allow CSOs and founding groups to easily filter and search through NSD resources. Additionally, [Section III](#) of this toolkit contains five tables with all of the resources found in the **New School Development Resources 2017** Excel spreadsheet.

First, we organized all NSD guidebooks we found into a “General” category. Then, after a literature review and interviews with CSO leaders, we identified five functional categories as key NSD focus areas: Community and Parent Engagement, Financial Management and Oversight, Operations and Compliance, Organizational Leadership and Governance, and School Culture and Academics. **Figure 1** shows how many resources in each category can be found in this toolkit.

**Figure 1:** *Functional Categories*

Functional Category	# of Resources
Community and Parent Engagement	7
Financial Management and Oversight	5
General	4
Operations and Compliance	14
Organizational Leadership and Governance	10
School Culture and Academics	9
<b>TOTAL</b>	<b>49</b>

Within each functional category, sub-categories will help users find the most relevant resource (Figure 2).

**Figure 2: Subcategories**

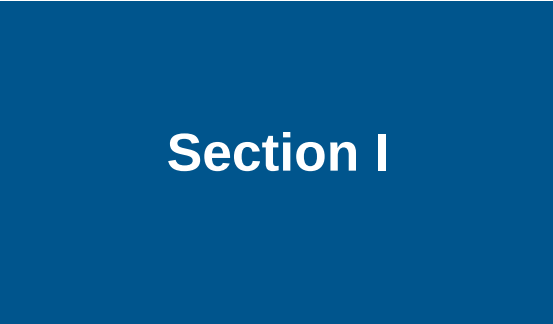
Functional Category	Sub-category	# of Resources
<b>Community and Parent Engagement</b>	Communications	1
	Community Partners	1
	Marketing	4
	Stakeholder Management	1
<b>Financial Management and Oversight</b>	Budget	1
	Finance	1
	Fiscal Oversight	2
	Procurement	1
<b>General</b>	Guidebook	4
<b>Operations and Compliance</b>	English Language Learners	4
	Facilities	4
	Planning Timeline	2
	Students with Disabilities	4
<b>Organizational Leadership and Governance</b>	Board Governance	6
	Founding Groups	4
<b>School Culture and Academics</b>	Assessments	1
	Content Standards	2
	Discipline	1
	Mission and Vision	1
	School Culture	3
	Teacher Recruitment	1

For this toolkit, we have compiled a variety of resource types (Figure 3), from publications to web-based tools.



**Figure 3:** *Resource Types*

Resource Type	# of Resources
Calendar	2
Chart	1
Diagram	1
Examples	3
Guide	1
Presentation	5
Publication	11
Roadmap	1
Skills Inventory	2
Toolkit	9
Videos	5
Webinar	1
Website Tool	1
Workbook	1
Worksheet	5



# CHARTER SUPPORT ORGANIZATIONS

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Arizona Charter Schools Association (The Association)

State Profile

**Arizona**

<i>Year Charter Law Was Enacted</i>	1994
<i>New Charters (Fall 2016)</i>	18
<i>Closed Charters (Spring 2016)</i>	11
<i>Net Gain Charters (2016-17)</i>	7
<i>Total Charter Schools (2016-17)</i>	547
<i>Charter School Growth %</i>	1%
<i>Estimated Enrollment (2016-17)</i>	180,000
<i>Charter School Student Growth %</i>	3%

## Organization Profile

### ***Arizona Charter Schools Association (The Association)***

<i>Year Organization Was Founded</i>	1995
<i>President</i>	Eileen B. Sigmund
<i>Address</i>	1825 E. Northern Ave, Suite 275, Phoenix, AZ
<i>Website</i>	<a href="http://www.azcharters.org/">http://www.azcharters.org/</a>
<i>Number of Employees</i>	19
<i>Number of Employees Supporting NSD</i>	1

The Association is a **nonprofit organization** that believes that all Arizona students should have **access to a high-quality public charter school**. The Association supports student achievement through high-quality charter schools, advocates for student equity and charter school autonomy, and leads Arizona charter schools as a sustainable, strong, credible organization. The Association is committed to the development of high-performing public charter schools and offers extensive support for teams looking to open a new charter school or expand a current high-performing charter school.

### **The Association provides the following New School Development services:**

- **Membership:** The Association offers membership support to educators, parents, and community leaders who are developing a charter school. There are two memberships options in this category.
- **Consulting:** Additional customized support, including charter petition guidance and review, governing board development, academic program design consulting, and business planning is available for select teams on a fee-for-service basis.
- **New Schools for Phoenix** works to recruit and equip leaders to open and lead high-quality schools in Phoenix. The Association partners with New Schools for Phoenix for some school start-up programs and membership support services.

### **Andrew Collins | Senior Director of School Development**

*“Charter school development requires a team effort, diverse skills and talents, commitment, and hard work. It is imperative that school developers understand the attributes of a quality school and build a strong foundation from the beginning.”*

## Colorado League of Charter Schools

## State Profile

***Colorado***

<i>Year Charter Law Was Enacted</i>	1993
<i>New Charters (Fall 2016)</i>	13
<i>Closed Charters (Spring 2016)</i>	1
<i>Net Gain Charters (2016-17)</i>	12
<i>Total Charter Schools (2016-17)</i>	238
<i>Charter School Growth %</i>	5%
<i>Estimated Enrollment (2016-17)</i>	114,700
<i>Charter School Student Growth %</i>	5%

## Organizational Profile

***Colorado League of Charter Schools (The League)***

<i>Year Organization Was Founded</i>	1995
<i>President</i>	Ben Lindquist
<i>Address</i>	2696 S. Colorado Blvd., Suite 250, Denver, CO
<i>Website</i>	<a href="http://www.coloradoleague.org/">http://www.coloradoleague.org/</a>
<i>Number of Employees</i>	12
<i>Number of Employees Supporting NSD</i>	2

The League provides a variety of services to support the development, growth, expansion, and replication of high-quality charter schools. The League's NSD services are designed to support planning efforts from the time founding groups first meet through a school's first year of operation. For existing schools that seek to grow, expand, or replicate, the League offers assistance in strategic, business, and multi-year financial and operations planning.

**The League provides the following New School Development services:**

- **Planning Process:** League representatives meet with founding groups to help structure a planning process, identify planning team capacity needs, and arrange for ongoing support via subsequent follow-up meetings and phone and email communications throughout the new school planning process.
- **Growth, Expansion, and Replication:** The League facilitates meetings with school boards and leadership to design a process and timetable for developing a business plan and a growth, expansion, or replication strategy.
- **Charter Application Reviews:** The League strongly encourages new school developers to request reviews of, and feedback on, draft charter school applications prior to submitting them to an authorizer. A team of internal and external reviewers are available, through the League, to evaluate each section of a draft application and provide constructive feedback about its comprehensiveness based on the League's Quality Standards for Developing Charter Schools.
- **Walton Family Foundation (WFF) Grant Partners Program:** The League works as a grant partner with the WFF to help the WFF identify promising schools and facilitate their grant process in Colorado.
- **Planning Grants:** Thanks to the generous contributions from the Anschutz Foundation and the Daniels Fund, The League offers seven planning grants that are designed for groups that are in the process of developing high-quality charter school models and are writing a charter application.
- **Fiscal Sponsor Services:** For a small fee, the League is available to serve as a fiscal sponsor for developing charter school groups that do not yet have their tax-exempt status.

**Nikki Myers | New Founder**

*"We used the Colorado League of Charter School's support extensively to connect to expertise, [application] review, etc."*

## Illinois Network of Charter Schools

### State Profile

#### ***Illinois***

<i>Year Charter Law Was Enacted</i>	1996
<i>New Charters (Fall 2016)</i>	3
<i>Closed Charters (Spring 2016)</i>	5
<i>Net Gain Charters (2016-17)</i>	-2
<i>Total Charter Schools (2016-17)</i>	143
<i>Charter School Growth %</i>	-1%
<i>Estimated Enrollment (2016-17)</i>	65,500
<i>Charter School Student Growth %</i>	2%

### Organizational Profile

#### ***Illinois Network of Charter Schools (INCS)***

<i>Year Organization Was Founded</i>	1995
<i>President</i>	Andrew Broy
<i>Address</i>	150 N Michigan Ave, Suite 430, Chicago, IL
<i>Website</i>	<a href="https://www.incschools.org/">https://www.incschools.org/</a>
<i>Number of Employees</i>	19
<i>Number of Employees Supporting NSD</i>	2

INCS is dedicated to improving education by establishing high-quality charter public schools that transform lives and communities. As the voice of Illinois charter schools, INCS advocates for legislation on behalf of the charter sector, provides support to strengthen charter schools, and influences education policy for the benefit of all public school students. INCS provides expert knowledge, coaching, resources, and connections to help school designers open excellent charter schools.

**INCS provides the following New School Development services:**

- **Charter Design Webinars:** Designing a Charter School Webinar (2011) discusses the key steps of charter school design.
- **Charter Starter Fundamentals:** The INCS Charter Starter Fundamentals are a series of three online, interactive training modules on key areas of charter school design. The full suite of modules cost \$250 and participants will come out of the course having drafted three sections of a charter school application.
- **Midwest Charter Design Institute:** Since 2011, the Charter Design Institute (CDI), has provided high-quality, interactive training to help educators, parents, and community leaders plan and launch high-quality charter schools.
- **Fast Forward Program:** The INCS Fast Forward program supports high-potential charter developers in starting new, high-quality charter schools in communities that need them.



## Innovative Schools (Active in Delaware)

## State Profile

***Delaware***

<i>Year Charter Law Was Enacted</i>	1995
<i>New Charters (Fall 2016)</i>	0
<i>Closed Charters (Spring 2016)</i>	2
<i>Net Gain Charters (2016-17)</i>	-2
<i>Total Charter Schools (2016-17)</i>	25
<i>Charter School Growth %</i>	-7%
<i>Estimated Enrollment (2016-17)</i>	15,300
<i>Charter School Student Growth %</i>	8%

## Organizational Profile

***Innovative Schools***

<i>Year Organization Was Founded</i>	2002
<i>Executive Chairman</i>	Matt Swanson
<i>Address</i>	100 W 10th St, Suite 403, Wilmington, DE
<i>Website</i>	<a href="http://www.innovativeschools.org/">http://www.innovativeschools.org/</a>
<i>Number of Employees</i>	22
<i>Number of Employees Supporting NSD</i>	4

Originally founded in 2002 to manage a loan guaranty fund that was established to assist the launch of charter schools, Innovative Schools has grown to become a multi-faceted public charter school support organization committed to creating groundbreaking improvement in student outcomes through integrated programs that deliver efficient schools, dynamic leaders, and exceptional education.

**Innovative Schools provides the following New School Development services:**

- Vision Exploration
- Feasibility Study
- Community Engagement
- Application Development
- Application Approval Process

## Maine Association of Charter Schools

## State Profile

**Maine**

<i>Year Charter Law Was Enacted</i>	2011
<i>New Charters (Fall 2016)</i>	2
<i>Closed Charters (Spring 2016)</i>	0
<i>Net Gain Charters (2016-17)</i>	2
<i>Total Charter Schools (2016-17)</i>	9
<i>Charter School Growth %</i>	29%
<i>Estimated Enrollment (2016-17)</i>	2,000
<i>Charter School Student Growth %</i>	32%

## Organizational Profile

**Maine Association for Charter Schools (MACS)**

<i>Year Organization Was Founded</i>	1995
<i>Executive Director</i>	Roger Brainerd
<i>Address</i>	32 Wesley Lane, Rockland, ME
<i>Website</i>	<a href="http://www.mainecharterschools.org/">http://www.mainecharterschools.org/</a>
<i>Number of Employees</i>	3
<i>Number of Employees Supporting NSD</i>	2

MACS supports all stakeholders in Maine's public education system, focusing on Maine Charter schools, Maine's Charter School Commission, Maine school districts interested in authorizing new public charter schools, and individuals and groups interested in founding new public charter schools. MACS can arrange an initial consultation to review the process of founding a new public charter school in Maine. Operators interested in opening a new school in Maine should consider that, in 2013, only 28 percent of the state's students attended city or suburban schools, compared to the approximately 72 percent who attended rural or town schools.

**MACS provides the following New School Development services:**

- Consultations
- Fiscal Sponsorship
- Start-up Grants

## Texas Charter Schools Association

## State Profile

***Texas***

<i>Year Charter Law Was Enacted</i>	1995
<i>New Charters (Fall 2016)</i>	64
<i>Closed Charters (Spring 2016)</i>	30
<i>Net Gain Charters (2016-17)</i>	34
<i>Total Charter Schools (2016-17)</i>	761
<i>Charter School Growth %</i>	5%
<i>Estimated Enrollment (2016-17)</i>	315,200
<i>Charter School Student Growth %</i>	13%

## Organizational Profile

***Texas Charter Schools Association (TCSA)***

<i>Year Organization Was Founded</i>	1995
<i>Executive</i>	Chuck Cook, Interim CEO
<i>Address</i>	700 Lavaca Street, Suite 930, Austin, TX
<i>Website</i>	<a href="http://www.txcharterschools.org/">http://www.txcharterschools.org/</a>
<i>Number of Employees</i>	18
<i>Number of Employees Supporting NSD</i>	1

Since 2008, TCSA has worked to **accelerate student achievement** in Texas by strengthening and supporting public charter schools. A cornerstone of TCSA's mission is to strengthen a diverse set of effective public charter schools. TCSA offers a competitive, specialized program ideal for the **inspired entrepreneurs, visionary leaders, and passionate educators** who are charter school founders. TCSA's team provides one-on-one support through every stage of the charter school development process from conception to the interview.

**TCSA provides the following New School Development services:**

- **Charter Start Membership:** Membership gives you access to advocacy, legal, marketing, training services, and networking with established school leaders for a comprehensive foundation for your public charter school.
- **Charter Start À La Carte:** TCSA offers up to 40 hours for state charter application review and state charter interview prep.

## Section II



### GENERAL GUIDEBOOKS

**Karen Farquharson | Montessori del Mundo, CO**

*“Have a support network. You need technical support, but you also need emotional support. Reach out to other founders and school leaders.”*

**Katherine Myers | Great Lakes Academy Charter School, IL**

*“Believe in your vision, be relentless in your commitment to your community, have high expectations for your new staff—your students deserve the best. If you can find an amazing partner to work with you, do it!”*

This section contains general resources from several organizations that have published full-length guides on the topic of NSD. CSOs and founding groups can use the links found in **Table 1** below to explore how different CSOs approach new school development.

**Table 1: General Guidebooks**

Sub-category	Resources Source	Resource Link	Year	Resource Focus
Guidebook	DC - Friends of Choice in Urban Schools (FOCUS)	<a href="#">D.C. Public Charter School Operations Manual - 3rd Edition</a>	2014	Pages 1-334: The intent of this manual is to provide easy access to the information that is essential for the successful operation of a charter school. FOCUS has attempted to capture many of the local and federal regulations that apply to charter schools in D.C. while also highlighting operational best practices.



Sub-category	Resources Source	Resource Link	Year	Resource Focus
Guidebook	GA - State Charter Schools Commission of Georgia	<a href="#">Starting Strong Best Practices in Starting a Charter School</a>	2014	Pages 1-42: This report summarizes findings from a study of charter schools in three states and interviews with organizations that support new charter schools through technical assistance, training, and resources in 11 states.
Guidebook	IL - Illinois Network of Charter Schools (INCS)	<a href="#">Illinois Charter Design Guidebook</a>	2014	Pages 1-233: <i>Paving a New Path: A Guidebook for Illinois Charter Public School Development</i> (Updated 2014) is an essential resource for anyone starting a charter school in Illinois.
Guidebook	MA - Massachusetts Department of Elementary and Secondary Education	<a href="#">Charter Schools Opening Procedures Handbook</a>	2017	Pages 1-115: The Office of Charter Schools and School Redesign has created the Opening Procedures Handbook as a tool to assist charter school founding groups in preparing for the exciting, yet challenging, task of opening a Massachusetts public charter school.

## Section III



### NEW SCHOOL DEVELOPMENT RESOURCE TABLES

The tables in this section contain resources in five different focus areas in the field of NSD:

- Community and Parent Engagement
- Financial Management and Oversight
- Operations and Compliance
- Organizational Leadership and Governance
- School Culture and Academics

The information in the following five resource tables can also be found in the accompanying Excel spreadsheet ([New School Development Resources 2017.xlsx](#)).

#### Community and Parent Engagement

**Nikki Meyers** | Academy for Advanced and Creative Learning, CO

*“Hold one or more community strategic planning meetings that get SWOT analysis data from multiple stakeholders in the community. You should have all pockets of the community present and able to speak to whether this is truly a niche and the numbers are there to support your proposal.”*

**Katherine Myers** | Great Lakes Academy Charter School, IL

*“Be genuine. Be humble. Learn as much about the community as you possibly can. Go to as many community events as you can. Speak from a place of honesty and sincerity at all times.”*

The resources in **Table 2** will help founding groups develop or improve marketing efforts and engage with community stakeholders and leaders. It is important for new founders to build relationships with parents and community organizations to ensure the vision of the school meets the needs of the community.

**Table 2:** *Community and Parent Engagement Resources*

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
Communications	Toolkit	LA - Louisiana Association of Public Charter Schools	<a href="#">Telling Your Charter School Story</a>	This toolkit is designed to help you think about how to tell your story, both within your own community and the broader education community statewide. (2015)
Community Partners	Worksheet	IL - INCS	<a href="#">Community Mapping</a>	Page 68: This worksheet helps founding groups think through all the community leaders and education stakeholders who might have an interest in their charter school's development. (2014)
Marketing	Calendar	CO - The League	<a href="#">Communication Calendar Worksheet</a>	Pages 16-17: Sample school communications calendar and worksheet to help founding groups design their own calendar. (2015)
Marketing	Guide	CO - The League	<a href="#">School Marketing in 4 Steps</a>	Pages 6-9: This resource contains four steps for effective school marketing. (2015)
Marketing	Publication	CO - The League	<a href="#">Quick Tips</a>	Pages 11-13: This resource contains marketing, website, and media relations tips for schools. (2015)
Marketing	Worksheet	CO - The League	<a href="#">Define Your School Experience Worksheet</a>	Page 15: This guide contains a worksheet to help founding groups define their school experience. (2015)
Stakeholder Management	Worksheet	DC - Achieve	<a href="#">Stakeholder Engagement Worksheet</a>	This document helps founding groups develop an action plan for engaging specific stakeholder groups, drawing attention to desired outcomes, current understanding, key messages, and timelines.

## Financial Management and Oversight

**Rich Abramson** | Snow Pond Arts Academy (SPAA), ME

*“Research all foundations and grants opportunities and start the process early for making applications.”*

**Nikki Myers** | Academy for Advanced and Creative Learning, CO

*“Seek financial experts who want to contribute. Some accounting firms want their associates to sit on a board or be on such a committee in order to build experience; seek that out.”*

The resources in **Table 3** pertain to establishing strong fiscal management practices, procurement policies, and oversight structures at the school level. Approximately 46 percent charter school closures in the fall of 2015 were due to financial challenges, underscoring the importance of this topic.<sup>4</sup>

**Table 3:** Financial Management and Oversight Resources

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
Budget	Toolkit	National Resource Center on Charter School Finance & Governance	<a href="#">A Cost Estimation Tool for Charter Schools</a>	This toolkit includes templates, worksheets, and an Excel spreadsheet covering a wide range of areas, to help new founders identify and estimate the range of costs and the timing of expenditures they will be obligated to cover during start-up and the early years of operation. (2015)
Finance	Presentation	LA – Louisiana Association of Public Charter Schools	<a href="#">Financial Health, Compliance, and Transparency</a>	This presentation highlights the basics of charter school financial health, internal controls, and preparing for audits. (2015)

<sup>4</sup> Consoletti A. (2011). [The State of Charter Schools](#). Washington, D.C.: The Center for Education Reform.

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
Fiscal Oversight	Presentation	NCSRC	<a href="#">Fighting Fraud: How to Avoid and Manage Financial Crises</a>	This presentation identifies and discusses solutions to major financial issues charter schools face. (2016)
Fiscal Oversight	Toolkit	NCSRC	<a href="#">A User's Guide to Fiscal Oversight</a>	Each toolkit compiles successful practices and recommendations on how to 1) prevent, 2) identify, and 3) manage the common financial issues that charter schools face. (2016)
Procurement	Toolkit	NY - New York Charter School Center	<a href="#">Vendor Analysis Toolkit</a>	This toolkit is an organized and focused way to document and evaluate vendor options. It aids decision-making by establishing a clear and organized basis for comparison. This suite of documents will be particularly helpful to procurement staff. (2010)

## Operations & Compliance

**Rich Abramson | Snow Pond Arts Academy (SPAA), ME**

*“Identify resources who can help get all of the start-up requirements in place; We used a former auditor to help us get all of the required tax and unemployment requirements in place.”*

**Nikki Myers | Academy for Advanced and Creative Learning, CO**

*“Document everything. Don’t re-invent forms, but get samples of forms from other places, and, where appropriate, create your versions that reflect your school. Record changes, record updates, record why. If it’s not documented, it doesn’t exist, and it didn’t happen.”*

The resources in **Table 4** will equip new founders with tools to research facilities, plan month-to-month activities, and develop proper support systems for special student populations. Founders and CSOs stressed that facilities and compliance were two areas where many founding groups experienced significant challenges.

**Table 4: Operations and Compliance Resources**

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
English Learners	Toolkit	NCSRC	<a href="#">English Learner Resources</a>	Pages 1-20: This compilation is designed to provide the charter school community with access to useful information (such as research, case studies, and toolkits) in support of their work to effectively serve English Learner students. (2017)
English Learners	Publication	NCSRC	<a href="#">Legal Guidelines For Educating English Learners In Charter Schools</a>	Pages 1-21: This report, authored by Safal Partners and Public Impact, investigates the legal parameters that charter schools need to be aware of as they attempt to serve the needs of English Learners. (2014)

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
English Learners	Videos	NCSRC	<a href="#">Serving English Language Learners and Families</a>	This resource provides insight into charter schools' obligations towards serving ELs and providing their limited English proficiency parents with meaningful access to school related information. (2015)
English Learners	Work-sheet	DC - Council of Chief State School Officer (CCSSO)	<a href="#">Accommodations Manual: English Learners</a>	Pages 33-86: This manual provides worksheets to help founding groups think through how to select, administer, and evaluate the use of accommodations for instruction and assessment of English Learners and Students with Disabilities. (2013)
Facilities	Publication	NCSRC	<a href="#">Finding Space: Charter Schools in District-Owned Facilities</a>	Pages 1-32: Charter school access to district-owned facilities is an increasingly important issue for the nation's charter community. The NCSRC has developed this paper to provide policy-makers and sector stakeholders with a more data-driven and nuanced exploration of the issue. (2015)
Facilities	Publication	NY - The Educational Facilities Financing Center of Local Initiatives Support Corporation	<a href="#">Charter School Facility Finance Landscape</a>	Pages 1-64: This 2010 edition of the landscape provides an updated snapshot of the charter school facility financing sector, including federal policies supportive of charter school facilities and state policies (pages 24-54) in all 40 jurisdictions with a charter law. (2010)
Facilities	Presentation	DC - The National Alliance for Public Charter Schools	<a href="#">Facilities Financing Overview &amp; Best Practices: Tax Exempt Bonds</a>	Topics discussed in this resource include benefits of the bond market; credit and performance requirements; innovative solutions for startups, expansion, and networks; real estate and project planning; and living through a bond deal. (2014)
Facilities	Presentation	LA - New Orleans School Facility Project	<a href="#">Facilities 101: Planning for and Paying for Your Charter School Facility</a>	This tool provides information for school leaders and board members interested in planning their own facilities.



Planning Time-line	Roadmap	IL - INCS	<a href="#">Roadmap for Charter School Development</a>	Pages 12-16: This roadmap gives founders an idea of steps in the process and an approximate order. (2014)
Students with Disabilities	Work-sheet	DC - Council of Chief State School Officer (CCSSO)	<a href="#">Accommodations Manual: Students with Disabilities</a>	Pages 35-74: This manual provides worksheets to help founding groups think through how to select, administer, and evaluate use of accommodations for instruction and assessment of Students with Disabilities. (2011)
Students with Disabilities	Toolkit	NCSRC	<a href="#">Students With Disabilities Resources</a>	Pages 1-25: This compilation of resources provides the charter school community with access to useful information (such as research, case studies, and toolkits) in support of their work to effectively serve students with disabilities. (2017)
Students with Disabilities	Toolkit	The Center on School Turnaround at WestEd	<a href="#">Assessing and Improving Special Education</a>	Pages 1-43: This program review tool was developed to assist school districts or individual school leaders in catalyzing conversations about, and reviewing and improving the quality of, their special education program. (2017)
Students with Disabilities	Videos	NCSRC	<a href="#">Serving Students with Disabilities in Charter Schools</a>	This webinar covers several research reports that examine issues around students with disabilities and charter schools. (2015)

## Organizational Leadership & Governance

**Karen Farquharson | Montessori del Mundo, CO**

*“Get some folks on your board with previous charter board experience and be intentional in transferring from founding to governing board.”*

**Katherine Myers | Great Lakes Academy Charter School, IL**

*“Make sure you have people who share your vision and understand the commitment you are asking for.”*

The resources in **Table 5** will help charter schools establish strong leadership and governance practices. Effective principals and school leaders are critical to the success of a school.<sup>5</sup> Several organizations beyond state-wide CSOs, such as Building Excellent Schools and Innovative Schools, have risen to recruit, train, and support new founders in starting a charter school. Board members, often part of the founding group, are also critical thought partners as they have the potential to offer expertise in areas such as finance or operations.

**Table 5: Organizational Leadership & Governance Resources**

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
Board Governance	Publication	DC - Charter Board Partners	<a href="#">Governance Best Practices</a>	Pages 1-30: Every charter school and respective board of trustees have a developmental life cycle, beginning with its founding and growing into maturity. This resource describes how the role of the board and its capacities will change throughout a school's life cycle. (2014)
Board Governance	Chart	IL - INCS	<a href="#">Board Diversity Chart</a>	Page 146: This chart can be used to determine if the founding group board is diverse and has the necessary expertise and experiences. (2014)

<sup>5</sup> Branch, G., Hanushek E., and Rivkin S. (2013). [School Leaders Matter: Measuring the impact of effective principals](#). Cambridge, MA: Education Next.

Sub-category	Resource Type	Resource Source	Resource Link	Resource Focus
Board Governance	Examples	MA - Board on Track	<a href="#">Charter School Board of Trustees Job Description</a>	Pages 1-3: This resource provides sample descriptions and expectations for board members. (2013)
Board Governance	Examples	MA - Board on Track	<a href="#">What Should Good Minutes Look Like?</a>	Pages 1-4: This resource provides guidance and examples of how to take better board meeting minutes. Minutes are typically used for constant referral and clarification of past activities and actions. (2014)
Board Governance	Videos	NCSRC	<a href="#">I Just Joined a Charter School Board...Now What?</a>	This webinar provides a framework and strategies for governing effectively, with real-life examples and case studies throughout that are relevant for new charter board members as well as school leaders and experienced board members. (2016)
Board Governance	Videos	NCSRC	<a href="#">Recruitment for Governing Boards</a>	Topics covered in the webinar include steps of an effective recruitment process, assessing your board, selection of new board members, and onboarding new board members. (2017)
Founding Groups	Skills Inventory	IL - INCS	<a href="#">Core Design Team Skills Inventory</a>	Pages 41-43: This resource is designed to help founding group assess the skills within their team and to identify any gaps. (2014)
Founding Groups	Skills Inventory	AZ – New Schools for Phoenix	<a href="#">Leadership Competency Framework</a>	Pages 1-10: This resource provides a framework across nine domains to evaluate school leaders. (2013)
Founding Groups	Presentation	CA – California Charter Schools Association	<a href="#">What I wish I had Known</a>	This presentation covers key problems and issues facing new school leaders. (2013)
Founding Groups	Presentation	GA - Hapeville Charter School and Career Academy	<a href="#">What I Wish I Knew: First 3 Years of Charter School Operations</a>	This presentation discusses topics around the first three years of charter school operations.

## School Culture and Academics

**Anna Cole** | Children's Kiva Montessori Charter School, CO

*"Visit lots of other schools, have a mission/vision driven school, and be clear about what your classrooms look and feel like."*

**Karen Farquharson** | Montessori del Mundo, CO

*"Academics: constantly re-assess your academics and adapt to your students. Keep your bar high. Culture: set clear expectations. Find as many ways to celebrate your staff and students as you possibly can. Then find some more."*

The resources in **Table 6** pertain to the establishing a strong school culture and increasing student achievement. Research has shown that a positive school culture is associated with **higher academic achievement, greater student engagement, and positive social skills** development.<sup>6</sup> School culture refers to the quality and character of school life. It reflects a school's shared values, assumptions, and beliefs. The second component of this category, academics, refers to a student's academic performance in areas such as reading, math, English, and science as measured by achievement tests. This also includes the ability to recruit and retain high performing teachers.

**Table 6: School Culture and Academic Resources**

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
Assessments	Workbook	DC - Council of Chief State School Officer (CCSSO)	<a href="#">Building an Interim Assessment System</a>	Pages 1-22: This workbook contains the vision, infrastructure, and resource questions critical to a thorough self-examination of readiness for an interim assessment system. (2010)

<sup>6</sup> Thapa A., Cohoen J., Guffey S., Higgins-D'Alessandro A. (2013). [A Review of School Climate Research](#). New York, NY: National School Climate Center, Fordham University.

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
Content Standards	Videos	DC - Council of Chief State School Officer (CCSSO)	<a href="#">Common Core Implementation Video Series</a>	Pages 1-22: These videos were developed to help diverse groups—educators, policymakers, and parents—better understand the breadth and depth of the Common Core State Standards (CCSS). (2012)
Content Standards	Website Tool	McREL International	<a href="#">Content Knowledge - Online Edition</a>	This resource is a compendium of content standards and benchmarks, including CCSS, for K-12 education in both searchable and browsable formats.
Discipline	Toolkit	NCSRC	<a href="#">Charter School Discipline Toolkit</a>	This toolkit discusses ways that school leaders can rethink student discipline and school climate. (2016)
Mission and Vision	Examples	IL - INCS	<a href="#">Examples of Missions and Visions</a>	Pages 80-82: This resource contains examples of vision and/or mission statements from a number of charter schools in Illinois. (2014)

Sub-category	Resource Type	Resources Source	Resource Link	Resource Focus
School Culture	Toolkit	NCSRC	<a href="#">Intentionally Diverse Charter Schools</a>	Pages 1-43: This toolkit is designed to help charter school leaders and their stakeholders design and implement intentionally diverse charter schools. It presents decisions and actions, along with specific examples from three diverse charter schools, for school leaders' consideration. (2017)
School Culture	Webinar	NCSRC	<a href="#">Webinar: Intentionally Diverse Charter Schools</a>	The purpose of this webinar is to share effective, evidence-based practices and school-based examples of how to foster diversity within a charter school. (2017)
School Culture	Diagram	IL - INCS	<a href="#">School Culture Plan</a>	Page 137: This diagram can be used to start planning for strong school culture. (2014)
Teacher Recruitment	Publication	INCS & The National Alliance for Public Charter Schools	<a href="#">Teacher Recruitment and Pipelines</a>	Pages 1-27: This paper highlights seven core practices that are foundational to building a high-quality teacher pipeline and the tactics behind them in an effort to help charter schools, and the organizations that support them, recruit and retain the best talent. (2016)

## Conclusion



**In 2006-07, there were approximately 1.2 million charter school students.<sup>7</sup> However, with the support of charter advocates, families, and CSOs, in the past ten years charter enrollment has nearly tripled to 3.1 million.**

As the demand for charter schools has grown, CSOs and other organizations have risen to provide state-wide support at multiple levels of a charter school's life cycle. Research studies suggest that a strong foundation and performance during a school's early years can set the stage for success in later years. By offering NSD services and support to founding groups, CSOs can help ensure founding groups have all the tools necessary to launch a successful charter school.

The five focus areas presented in this toolkit are not meant to be an exhaustive list. Instead, they are the minimum a founding group should focus on when preparing to start a school. The CSOs that were profiled in this toolkit are meant to be representative of the range of services and landscapes found throughout the nation. Regardless of staff size or differences among states, all CSOs we interviewed understood the challenges facing new founders and were eager to share resources with the entire charter school community.

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<sup>7</sup> The National Alliance for Public Charter Schools. (2017). [Estimated Charter Public School Enrollment, 2016-17](#). Washington, D.C.