



Idaho Department  
of Education

# Charter Board 101: Requirements, Reports, and Resources

Are students thriving in chartered waters?



# Topics in this Presentation

1. Effective Charter Schools
2. Legal Requirements
3. Governance vs. Management
4. Three Questions
5. How are students doing?
6. Resources





Idaho Department  
of Education

# 1. Effective Charter Schools

Making Progress



# Effective Charter Schools Characteristics

Strong academics

Engaged and effective governance

Sound finances

Satisfied / invested stakeholders



Students  
Parents  
Staff  
Taxpayers  
Community members







Idaho Department  
of Education

# 2. Legal Requirements

A Public and Educational Entity



# Legal Requirements

Before submitting the charter:

- [Idaho Non-profit corporation](#)
- Articles of Incorporation
- By-laws



Once approved:

- 501(c)(3) Tax Exemption
- Non-profit requirements
- **SAM UEI** and **CAGE CODE**
- **Employer Identification Number**
- Code of Ethics

System of Award  
Management Unique  
Entity Identifier: used  
as a federal identifier  
for federal grant  
dollars

Commercial  
and  
Government  
Entity: used to  
identify vendors

Used for tax identification  
purposes

# Operational Legal Requirements

## Public Entity

Open meeting laws

Public records

Financial disclosure laws

Purchasing, contracting



## School/Local Education Agency

Reporting

Academic requirements

Finance



Idaho Department  
of Education

# 3. Governance vs. Management

Board Responsibility





## Charter Board 101

# Responsibility of Administration: School Management

The operational activities that **carry out the objectives** are the responsibility of the administration

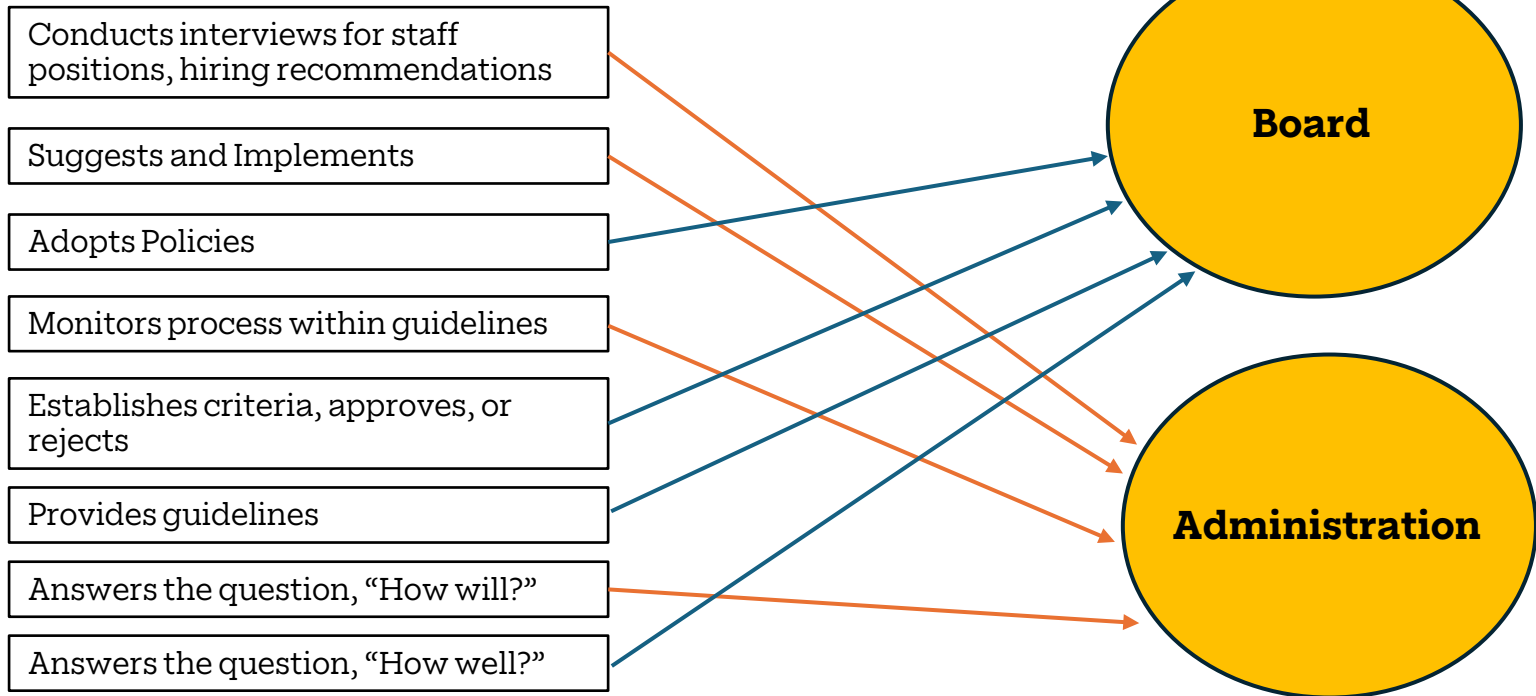
Management answers the question, “How **will?**”

Is it a day-to-day issue or big picture decision?

The process of setting and achieving goals through planning, organizing, staffing, directing, and controlling. These processes utilize human, financial and material resources.



# Let's Practice:





Idaho Department  
of Education

# 4. Three Questions

Keeping Board Meetings Meaningful



# How do you know how *well* things are going?

There are three questions to ask at every board meeting that will help with this.





# **Three Questions:**

## **What should the board be asking?**

### **1. How are students performing?**

Are they successfully navigating the chartered waters? How do you know?

### **2. What is the condition of the finances?**

How are funds being utilized?

### **3. Are we meeting all legal requirements?**

# Three Questions:

## 1. Student Performance



How well are the students achieving the outcomes contained in our charter?

What outcomes & how are they measured?

What are the state accountability measures – are we meeting them?

What does our **mission** specifically measure?

What academic data should we be reviewing?

When is the data available?

Keep the charter  
in the forefront!

# Additional Academic Questions

How does the charter compare to...

The state? The districts? Neighboring districts? Similar charters?

What are the trends with our data?

Overall? Specific grades? Specific subgroups?

What is our proficiency data? Our growth data?

How are they related?

Was the school identified for improvement?

What identification?

What subjects?

What subgroups?



# Resource for Data:

Idaho State  
Department of  
Education

Learn more about your school or district here

 Enter your school's name



[www.idahoschools.org](http://www.idahoschools.org)

This website contains academic, demographic, and survey data for public schools.

# Resource for Testing Data:

## Assessment & Accountability



The Assessment & Accountability department measures student achievement by identifying areas needing intervention, remediation, or acceleration. We also identify performance trends in student achievement and growth.

[→ Learn more about us](#)

[→ Why Assessment Matters](#)

[SY2024-2025 Assessment Testing Window](#) | →

[2023-2024 Important Updates](#) | →

[Town Hall Meeting Feedback](#) | →

[Testing Population Requirements](#) | →

<https://www.sde.idaho.gov/assessment/index.html>



# Student Performance | Academic Data - Calendar

When should we be looking at data?

August – State/District/School Accountability Data

October – IRI data

February – Graduation rate appeals

April/May - WIDA, ISAT preliminary data,

IRI Spring Data



Look for a performance certificate from your authorizer! This is reviewed annually and renewed every three (for pilot charter), six, or twelve years (dependent on authorizer agreement).

# Three Questions:

## 2. Finances

- How well is the school's money being managed and safeguarded from risk?
- Is the money management representative of the public's interests?
- What internal control policies are in place?
- Analysis of budget to actuals – expenditures and revenues
- Review of expenditures – budgeted, reasonable, necessary
- Review and responses to audits - annually
- Knowledgeable staff
- Staff and student retention

## 2. Finance | Additional Questions

- What is our current enrollment and average daily attendance?
- How does it compare to our budget considerations?
- How many support units do we generate?
- How many have we hired?
- How does our teacher pay compare to our reimbursement amount?
- How do our expenditures compare to our budget? Year to date?
- What other “service” contracts do we have and what do they cost?
- What % of our budget goes to personnel? Facilities?
- What is our cash on hand amount?

# Financial Data - Calendar

## When should we be looking at data?

- **May/June** – Budget Hearing
- **September/October** – Audit Report
- **February** – first foundation payment received from actual data (calibrated using actual data and previous payments)
- **April/May** - Budget Preliminaries/Amendments

# Three Questions:

## 3. Legal Requirements

How well is the school complying with all statutory and regulator requirements?

- Attorney – knowledgeable about charter school requirements and school law
- Reporting deadlines – [Data Acquisition Calendar](#)
- Communication with authorizer
- Complaints
- Idaho Open Meeting & Public Records Laws
- Annual policy reviews – Student Safety, Homeless, Parent Engagement,
- Reasonable effort at oversight



### 3. Legal Requirements | Operational Questions

- What are the results of our annual inspections?
- Have we had any formal complaints?
- What does our authorizer's annual report say?
- Is our reporting on time and accurate?
- How is our growth impacting our culture?
- Have the evaluations been completed? Including the administrator/director?

# Let's practice!

## Three Questions:

1. Student Performance
2. Finances
3. Legal Requirements

Do you see an example for each of these questions at the board meeting represented on this board agenda?

### AGENDA –

MONDAY, OCTOBER 21, 2019

FINANCE & LONG-RANGE PLANNING MEETING – 5:30 PM  
BOARD OF DIRECTORS MEETING – 6:00 PM

#### 5:30 p.m. Finance and Long-Range Planning Meeting

1. Financial Report
2. Audit
3. Strategic Plan
4. Chair Report

#### 6:00 p.m. Board of Directors Meeting

1. Call to Order
2. Quorum Check
3. Pledge to the Flag
4. Meet the Staff
5. Public Comment
6. CPO Report
7. Motion to Approve Minutes from September 16, 2019 \*ACTION ITEM\*
8. Principal's Report – [Name], Chair
  - Enrollment Report
  - Staff Updates
  - Alumni Accomplishments
9. Vice Principal's Report – [Name], Chair
  - Activities & Discipline Report
  - ASB Report
10. Regular Committee Reports
  - Finance/LRP – [Name], Chairman
  - Scholarship – [Name], Chair
  - Education Excellence – [Name], Chair
  - Fundraising – [Name], Chair
11. Executive Session/Roll Call  
Idaho Code 74-206 (A), (B), (C) & (J)
12. Unfinished Business
  - Policy Updates \*ACTION ITEM\*
  - Sick Leave Policy \*ACTION ITEM\*
  - Band Trailer \*ACTION ITEM\*
  - Electric \*ACTION ITEM\*
13. New Business
  - Board Terms \*ACTION ITEM\*
  - Consent Agenda \*ACTION ITEM\*
14. Public Comment
15. Adjournment

NOTE: If any auxiliary aids or services are needed for individuals with disabilities, please contact the Clerk of the Board, at 208.676.1667, no later than three (3) working days before the meeting. PERSONNEL MATTERS ARE ROUTINELY UNDERTAKEN IN EXECUTIVE SESSION. DISCUSSIONS ABOUT SPECIFIC PERSONNEL MATTERS ARE NOT AN APPROPRIATE PART OF AN OPEN MEETING AGENDA.



Idaho Department  
of Education

# 5. How are students doing?

Ensuring Academic Progress



# How are students doing?

Though the school board's role is clearly defined as *governance* and not *management*, student success should always remain as the top priority. It is, after all, why we are here.

As a charter, you have an advantage over traditional schools; you can determine different methods (in addition to the standardized test and academic data) through which students can demonstrate mastery of your charter's mission.

How can you, as a board member, monitor how effectively students are navigating the chartered waters?

- Presentations
- Performances
- Portfolios
- Successful internships
- Projects



# How are students doing?

As a board, you should receive academic data at every board meeting. It is vital that you are shown evidence that students are not only thriving through your unique educational model but that they are also succeeding in traditional academic measures.

- Formative assessments
- IRI (Idaho Reading Indicator)
- ISAT (state standardized test)



# In conclusion...

The vision has been set. Whether you were personally a part of founding your charter school or came on board after it was established, the unique mission (charter) that has been written and approved is your guiding light.



Remember to:

- Remain effective
- Keep it legal
- Govern, don't manage
- Ask (at least) 3 questions at every board meeting
- Keep your eyes on the goal = student success in your charter



- *Charter School Board University* by Dr. Brian L. Carpenter
- *Improving School Board Effectiveness: A Balanced Governance Approach* by Thomas L. Alsbury and Phil Gore
- *The Essential School Board Book: Better Governance in the Age of Accountability* by Nancy Walser
- [National Charter School Resource Center](#)
- [Idaho Charter Schools](#)
- [Idaho School Board Association](#)
- [Idaho Charter School Network](#)





Idaho Department  
of Education

# Thank you for serving Idaho students!

Rachel Burk

Parent Engagement & School Choice Coordinator

208-332-6956

[rburk@sde.idaho.gov](mailto:rburk@sde.idaho.gov)

<https://www.sde.idaho.gov/school-choice/charter/>