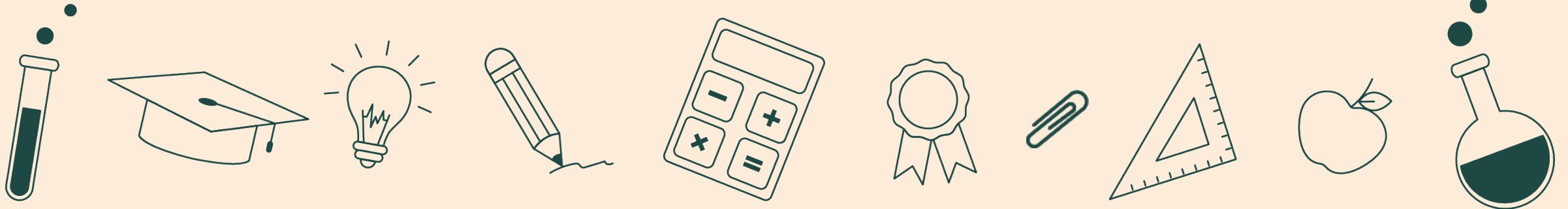# SCSC Post-Approval Meeting

Agenda

- SCSC Staff Introductions
- SCSC Pre-Opening Checklist
- New School Supports
- Funding and Enrollment Projections
- Comprehensive Performance Framework Overview

SCSC Staff

Donovan Head, *Executive Director*

Operations

Cerrone Lockett, *Chief Operating Officer*

Crystal Saldana, *Office Coordinator*

Finance

Carmen Freemire, *Sr. Director of School Finance*

Candice Ball, *Business Manager & Financial Program Coordinator*

Legal

Erin Wright, *General Counsel*

Tiffany Leach, *Sr. Associate General Counsel*

Kiara Thompson, *Legal Programs Specialist*

Office of Charter School Compliance

Allen Mueller, *Sr. Director of the Office of Charter School Compliance*

Research & Evaluation

Katie Manthey, *Director of Research & Evaluation*

Henry Siebentritt, *Evaluation Analyst, Academic Programs*

New Schools

Kristen Easterbrook, *Director of New Schools*

Robert Watts, *Facilities and Assets Manager*

School Support & Outreach

Michele Neely, *Sr. Director of School Support & Outreach*

Erica Acha-Morfaw, *Communications Specialist*

Naquita Smith, *School Support & Outreach Coordinator*

Vision

Innovative and superior charter schools advancing education in every community.

Mission

The mission of the State Charter Schools Commission of Georgia 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.

State Charter Schools Commission

scsc.georgia.gov

Pre-Opening Checklist

SCSC Pre-Opening Checklist

- The **SCSC Pre-Opening Checklist** outlines milestones that must be satisfied during the planning year prior to opening a state charter school.
- **Priority Milestones** are tasks that must be completed by a designated date. Evidence of the completed task <u>must</u> be submitted to the SCSC.
- **Ongoing Obligations** are actions the school should take to ensure a successful school opening but <u>do not</u> require evidence of their completion to be submitted.
- Milestones are organized categorically by:
  - Key Decisions
  - Governance
  - Facilities
  - Students & Parents
  - Finances
  - Operations
  - School Personnel
  - Academic Program
  - Training

How to Submit Pre-Opening Checklist Documents

▪Upload documents to the SCSC Portal: https://scsc-portal.fluidreview.com/

▪Only ONE login per school – governing board chair or school leader should have received an email from the SMApply platform with initial login information.

▪This will be the same platform that your school will use for monitoring, performance reviews, governance training certification, and numerous other SCSC applications.

    ▪This platform will not be used to transfer sensitive student or staff information so login information can be shared with other team members as necessary.
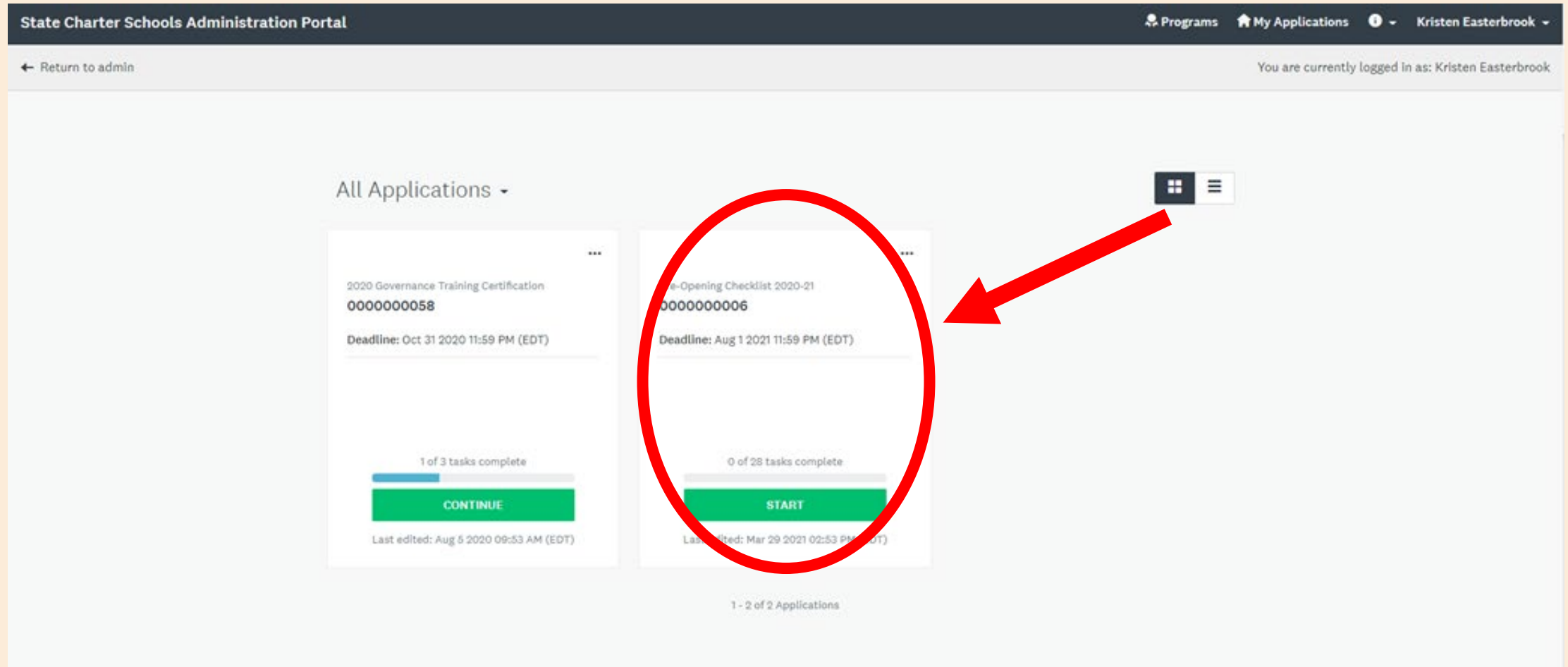
How to Submit Pre-Opening Checklist Documents
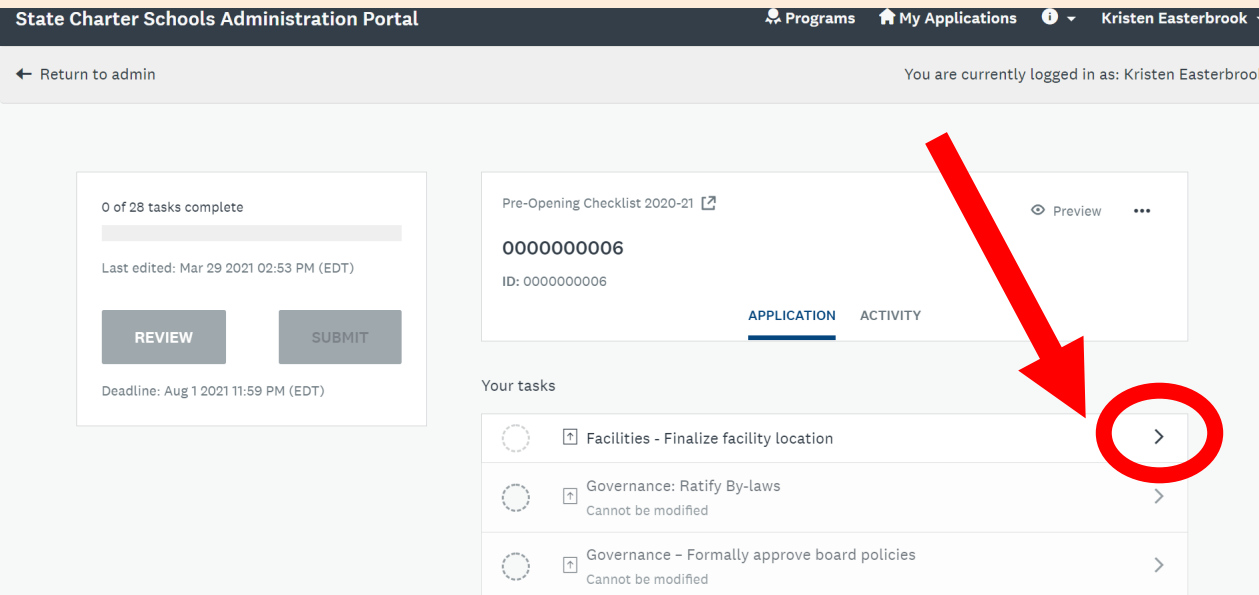
- Items are generally listed by the date they are due.
- You must submit the required supporting documentation for Priority Milestones. You **do not** have to submit supporting documentation for Ongoing Obligations.
- To upload a document for a Priority Milestone, click the arrow next to the task item.

State Charter Schools Commission

scsc.georgia.gov

How to Submit Pre-Opening Checklist Documents

State Charter Schools Commission   scsc.georgia.gov

File Types Supported for Uploads

- Microsoft Excel Spreadsheet (.xls)
- Microsoft Excel Open XML Spreadsheet (.xlsx)
- Microsoft Word Document (.doc)
- Microsoft Word Open XML Document (.docx)
- Portable Document Format (.pdf)
- PowerPoint Open XML Presentation (.pptx)
- PowerPoint Presentation (.ppt)

State Charter Schools Commission

scsc.georgia.gov

New School Supports

State Charter Schools Commission

scsc.georgia.gov

Supports and Training

New School Specific Supports (Year 0)

- Implementation Support Specialist
- Facilities Support

Recommended (Year 0- Year 1)

- Charters Schools Financial Management Certification Program (finance officers)
- Leader Advisor Program

Required Trainings

- **SCSC** Governance Training (**ALL** Board Members)
- SCSC New School Orientation (January 2025 & March 25)
- LEA Reporting Training (July 2025)
- GaDOE Data Collections Conference (August 2025)

Questions?
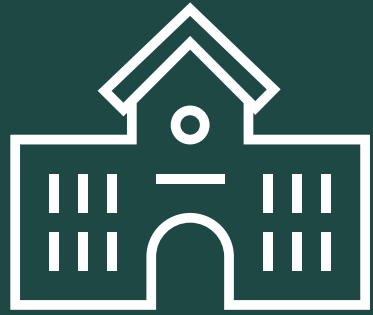
Funding Overview

QBE Funding
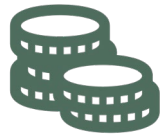
State Charter Supplement Funding

Forward Funding- State and Federal

Enrollment

CPF Financial Performance

Why are We Here?

- **What Financial Related Questions do You Want Answered During our Time Together?**

Schools Receive Three Types of Funding

State/QBE Funding

- Enacted in 1985
- Public education funding Grades K – 12
- Does not include Pre-K

State Charter Supplemental Funding

- Funding for state charter schools
- 3 components: base supplement, capital outlay & categorical grants

Federal Funding *can include*

- Every Student Succeeds Act (ESSA) grants e.g. Title IA
- Individuals with Disabilities Education Act (IDEA)

Quality Basic Education (QBE) Funding

Total QBE includes 2 categories of revenue:

- Amounts based on the number and types of students (Grade specific, Special Education, …)
- Training and Experience (T&E) of Staff

And 2 categories of deductions:

- Local Five Mill Share (LFMS)
- Austerity- not applicable for FY25

QBE = ((student FTE + teacher T & E) – LFMS) - Austerity

QBE = ((student FTE + teacher T & E) – LFMS) – Austerity

Administered using weighted FTE (full-time equivalent) counts

Does not represent the number of students in seats, but instead is based on the time that students spend in various instructional programs.

School day is divided into 6 segments. Schools earn funding based on the placement of student during each segment.

1 FTE is comprised of 6 instructional segments.

QBE Funding for Students - FTE

19 different QBE programs

- 6 programs are for Exceptional Education students
  - ➢ Mild Resource
  - ➢ Moderate Resource
  - ➢ Moderate Self-Contained
  - ➢ Severe Self-Contained
  - ➢ Inclusion
  - ➢ Gifted
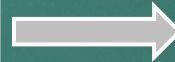
Program weights are based on the cost components of each program.

- The high school general education program has the lowest estimated cost and is assigned a weight of 1.0.

- Weights for other programs equal the per pupil cost for that program divided by the per pupil cost of the high school gen ed program.

- Weights change over time as the cost of each program changes.

Different Levels of Funding Earning for Students in the following QBE Programs

Kindergarten	K Early Intervention	Grades 1-3	Grades 1-3 Early Intervention	Grades 4-5	Grades 4-5 Early Intervention
Middle Grades	Middle School Program	Grades 9-12 (Base)	SPED I	SPED II	SPED III
SPED IV	SPED V	CTAE	Gifted	Remedial	Alternative
		ESOL			

On FTE is Equal to 6 Instructional Segments
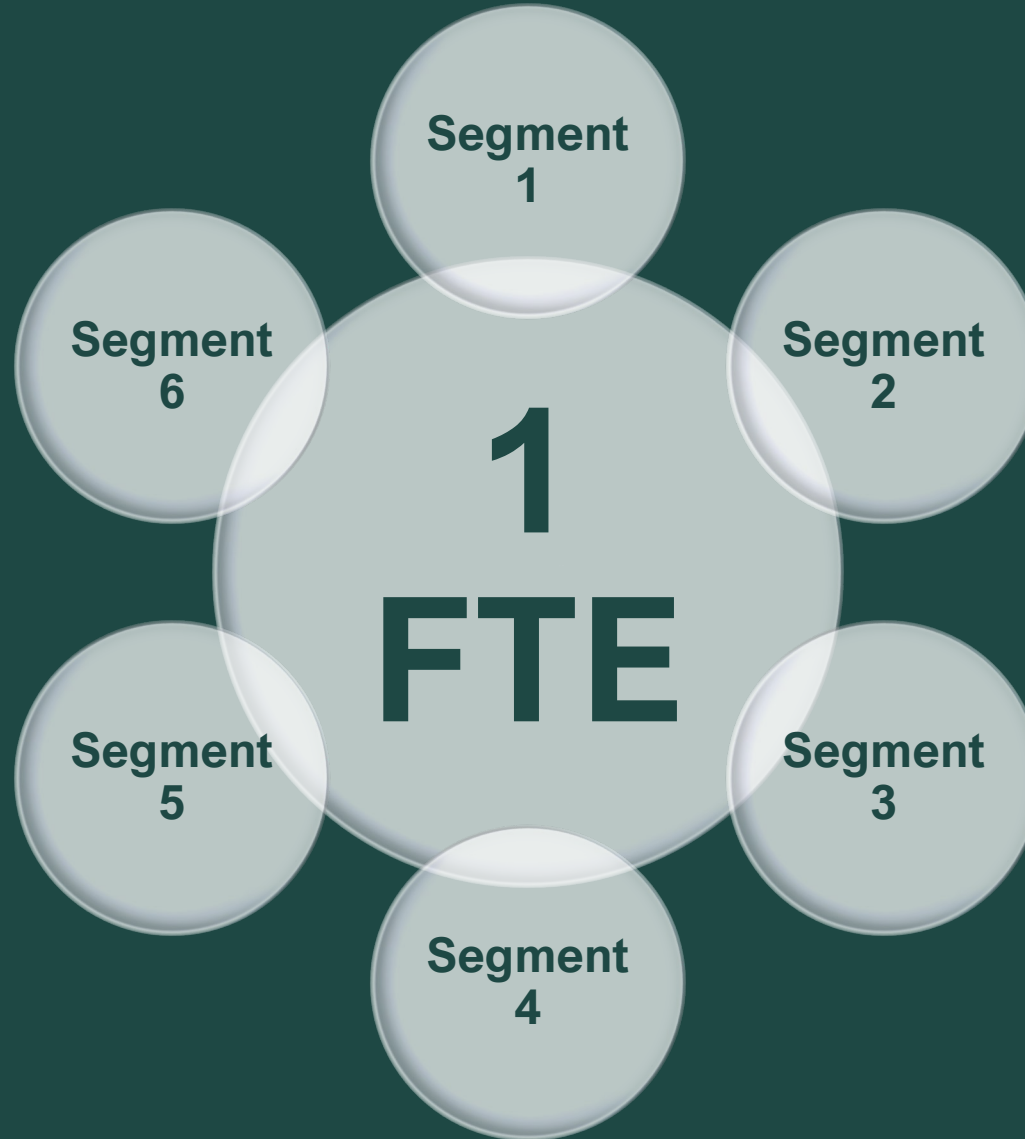
QBE Funding for Students
Example

- Base weight = $3,000

- 4 segments – H.S. gen ed classroom (funding weight 1.0)

- 2 segments – special ed program (funding weight 2.8)

- Daily weight = 1.6
  - ((4 x 1.0) + (2 x 2.8)) = 9.6/ 6= 1.6

- Funding earned = base allocation x daily weight
  - Base allocation = $3,000
  - **$3,000 x 1.6 = $4,800**

State Charter Schools Commission

scsc.georgia.gov

1 FTE = HS / HS / HS / HS / Spec Ed / Spec Ed

$4,800 earned for student

1 FTE = HS / HS / HS / HS / HS / HS

$3,000 earned for student

State Charter Schools Commission

scsc.georgia.gov
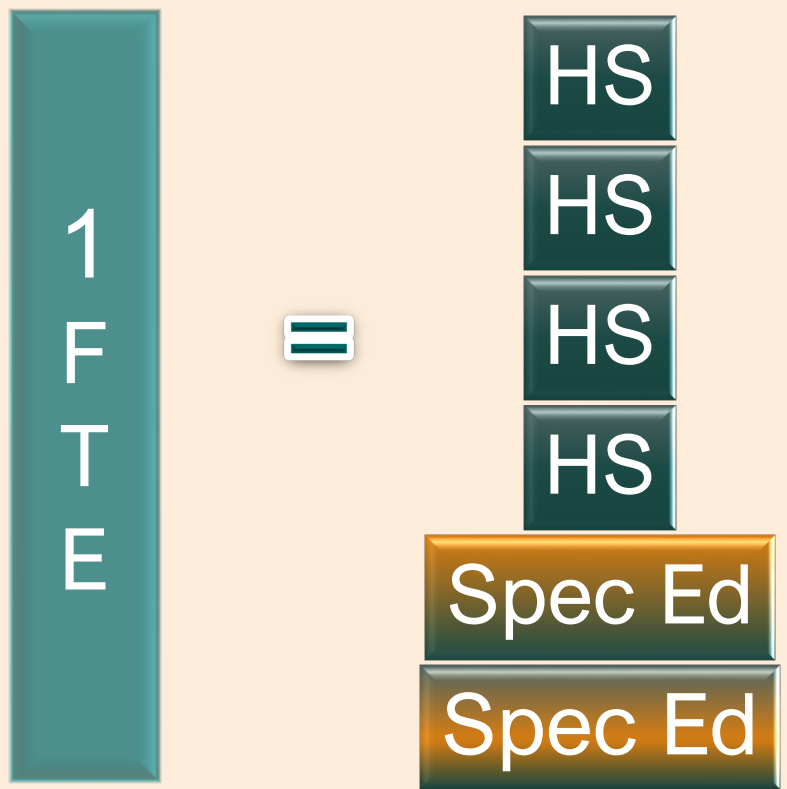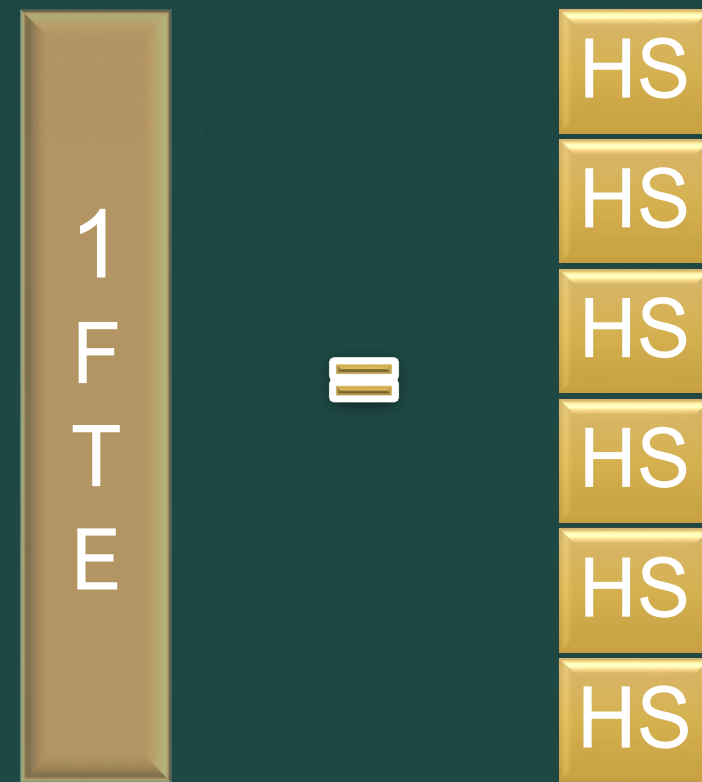
Programs and Program Weights for FY25

Kindergarten Program	Middle School Program	High School Program (Base)	Gifted
Weight: 1.6901	Weight: 1.1439	Weight: 1.0000	Weight: 1.7340
Allocation per FTE: $5,394.36	Allocation per FTE: $3,650.88	Allocation per FTE: $3,191.67	Allocation per FTE: $5,534.21

QBE Funding for Teachers – T&E

QBE = ((student FTE + teacher T & E) – LFMS) - Austerity

Training & Experience (T&E)
    Training – based on degree or certifications
    Experience - # of years

Base Salary Schedule
    Base Rate FY25: $43,592

Funding covers the state-minimum salaries of certified personnel

QBE Deductions - Local Five Mill Share

QBE = ((student FTE + teacher T & E) – **LFMS**) - Austerity

Since FY13 the General Assembly has required a deduction from QBE equivalent to LFMS from state charter schools' funding.

Deduction = **lower** amount of either :

FY25 Statewide average - $1, 827/FTE - <u>OR</u>

Schools with a statewide attendance zone will use the statewide average.

The average LFMS of the districts comprising the attendance zone.

QBE Deductions - Austerity
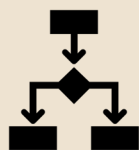
QBE = ((student FTE + teacher T & E) – LFMS) – **Austerity**

As a result of difficult economic conditions, the General Assembly may implement a reduction of education funding.

FY21 – Austerity was 10.37%

FY22 – Austerity was 4.23%

FY23- FY25- Austerity 0%

State charter schools receive the same austerity deduction as all other public schools.

QBE – As a Board Member

Less Important: understanding the precise calculation of QBE.

More Important: understanding that specific student. characteristics impact funding & understanding any special conditions (i.e. austerity) that impact revenues.

Role of the Data Collections process.

Importance of Appropriate Personnel.

Oversight: ⟶ Periodic reports on data collections cycles

⟶ Review allotment sheets

QUESTIONS

State Charter Supplemental Funding

Three Components to Determine Funding:

Categorical Grants

Transportation, nutrition, nursing, etc.

Base Supplement for B/M

Proxy for local funding

FY25: $4,507 - $6,365/FTE

Capital Funding for B/M

For capital expenses

FY25: $1,718 - $3,684/FTE

Total Supplement = (categorical grants + base supplement + capital funding) – commission fee

Commission Fee

Up to 3%

Historically the SCSC has withheld less than 3%.

FY25 1.8%

Supplement Funding –Categorical Grants

Common Categorical Grants
State Nutrition Grant
FY25 Average: $18.42/FTE

State Transportation Grant
FY25 Average $83.92/FTE

Nursing Grant
$20,000 for all SCSC schools, excluding 1st year schools
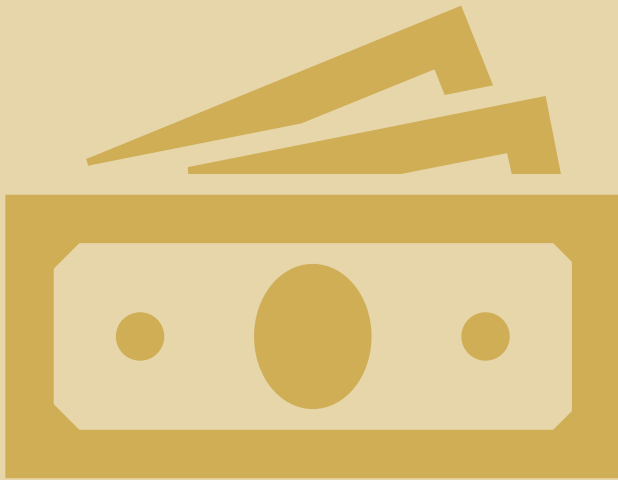
Supplement Funding – Base Supplement

Equal to –

- Average local revenue (plus equalization) of all school districts (i.e. **statewide average**) – unless

- Average local revenue (plus equalization) of districts comprising the school's attendance zone is less than the statewide average – then

Amount will be equal to:

- **Average of the local districts within the attendance zone** – or

- **Average of the five lowest-funded districts**

- Whichever is greater

Supplement Funding – Capital Funding

Statewide average per pupil capital expenditure (excluding local revenue bonds) –

Whichever is greater

Per pupil capital expenditure of the school system in which the school is located.
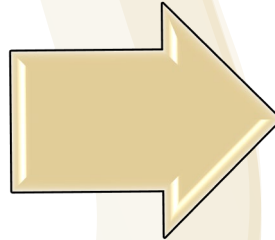
FY 25 Capital Funding

$1,718 - $3,684 per FTE

Supplement Funding – Virtual Schools

Generally, do not receive Transportation or Nutrition grants.

Base Supplement is funded at 2/3 of the statewide average

FY25- $4,243

Capital Outlay is funded at 1/4 of the statewide average

FY25- $430

LFMS contribute 2/3 of the statewide average

FY25- $1,218

Forward Funding Overview

Purpose- to provide funding for a new or existing SCSC school that is either:

- In the first year of operation or
- Anticipates growth of 2% or greater

School leaders submit projections to the SCSC each May.

- Schools update template provided by the SCSC

Funding is adjusted when state budget is adjusted at midterm.

- Over projections = reduced allotments
- Under projections = increased allotments

FTE Cycle

MARCH
FTE Count

MAY
Charters submit projected growth 2% or greater to SCSC

JULY
Charters are forward funded in initial QBE with the projected counts included

OCTOBER
FTE Count

DECEMBER
If projected numbers are much less than actual Oct FTE, QBE is adjusted DOWNWARD.

State Charter Schools Commission

scsc.georgia.gov
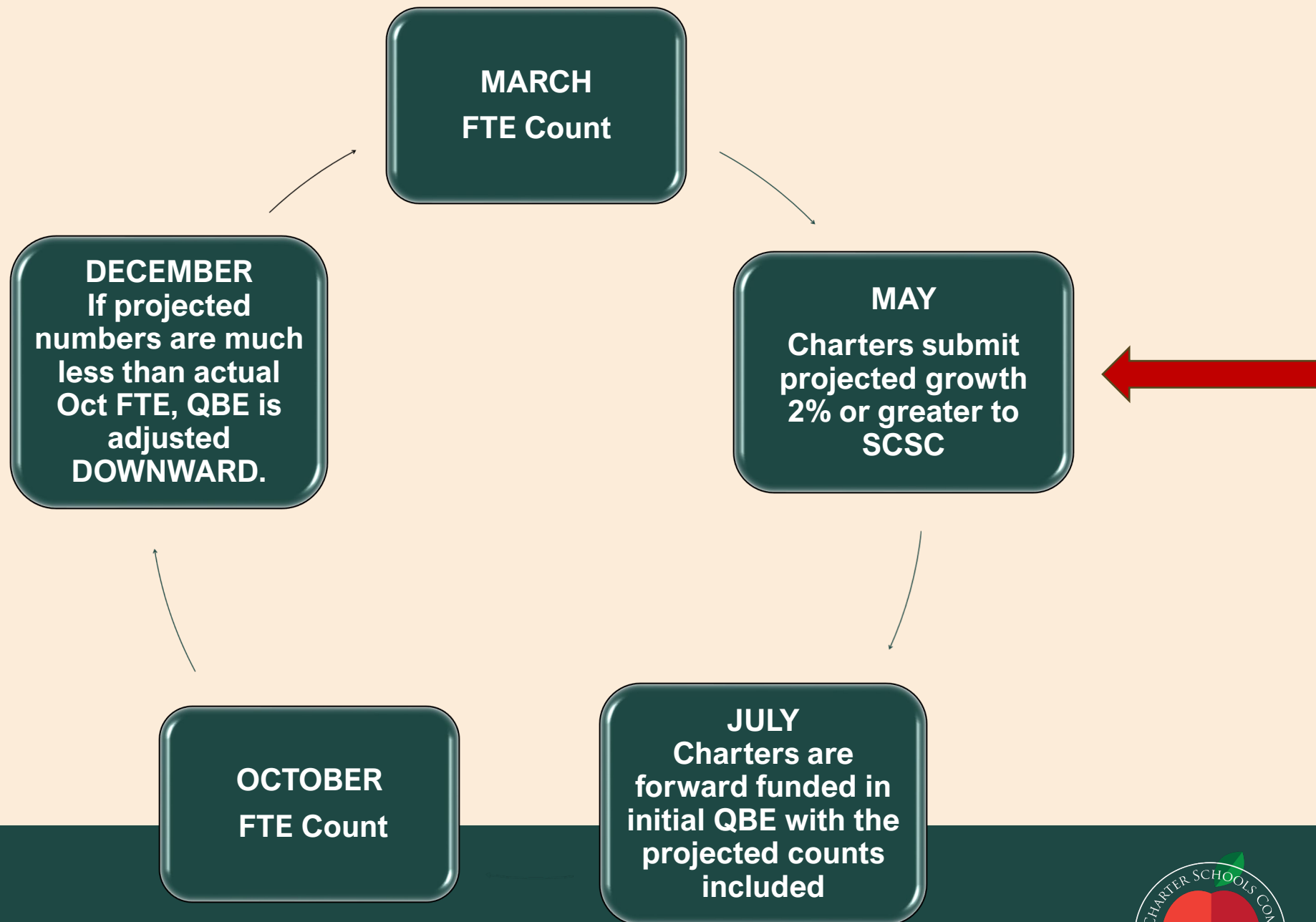
Forward Funding - Example

- Super Great Charter School
  - K – 8
  - Track record – 500ish students
  - Loss of industry → decline in students
  - October FTE – 450 students
  - Midterm held harmless? **YES**
  - If FTE declines continue then school will experience a reduction in funding, but not until the following fiscal year.

- Super Awesome Charter School
  - K – 5
  - Track record – 300ish students
  - Add grades 6 – 8 with 200 additional students projected (500 total)
  - No sports → only 100 additional students enroll (400 total)
  - Midterm held harmless? **NO**
  - School will see a decrease in their funding during the current fiscal year.

Forward Funding for Federal Funds

Purpose- to provide funding for new or existing SCSC schools that are:

- **In the first year of operation or**
- **Anticipate growth of 33% or greater or**
- **Are adding a grade, not held to 33% threshold.**

School leaders submit projections to the SCSC each May

- **New schools submit anticipated first year enrollment and a projected poverty percentage.**
- **Expanding schools submit anticipated increases in enrollment due to growth or adding a grade(s).**

Forward Funding – As a Board Member

More important: Understand components of state and federal funds

Understand the perils of under-estimating or over-estimating enrollment

Understand when funding WILL and WILL NOT be "held harmless"

Role of SCSC May Collection Survey/Spreadsheet

Understand FTE cycle

Enrollment

State Charter Schools Commission

Enrollment Drives Funding

Consequences of under-enrollment

- Fixed costs versus non-fixed costs
- Academic program impact
- Enrollment variance impact
- Impact on renewal

Considerations

- Track enrollment and identify trends
- Explore the use of a Customer Relationship Management (CRM) tool
- Impact of Over-enrollment

Students

Teachers

Facilities

Expenses

Revenue

$

$

State Charter Schools Commission

scsc.georgia.gov
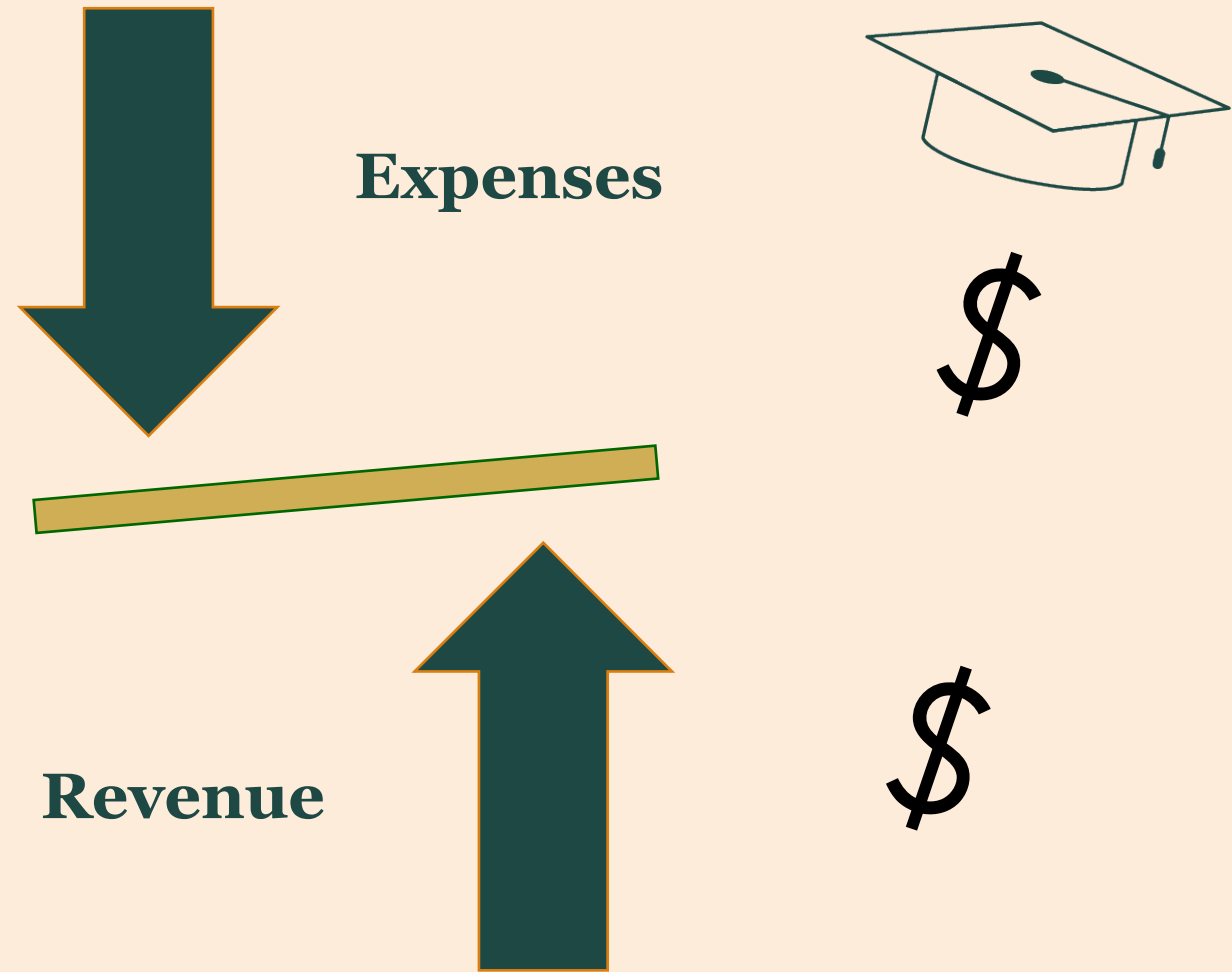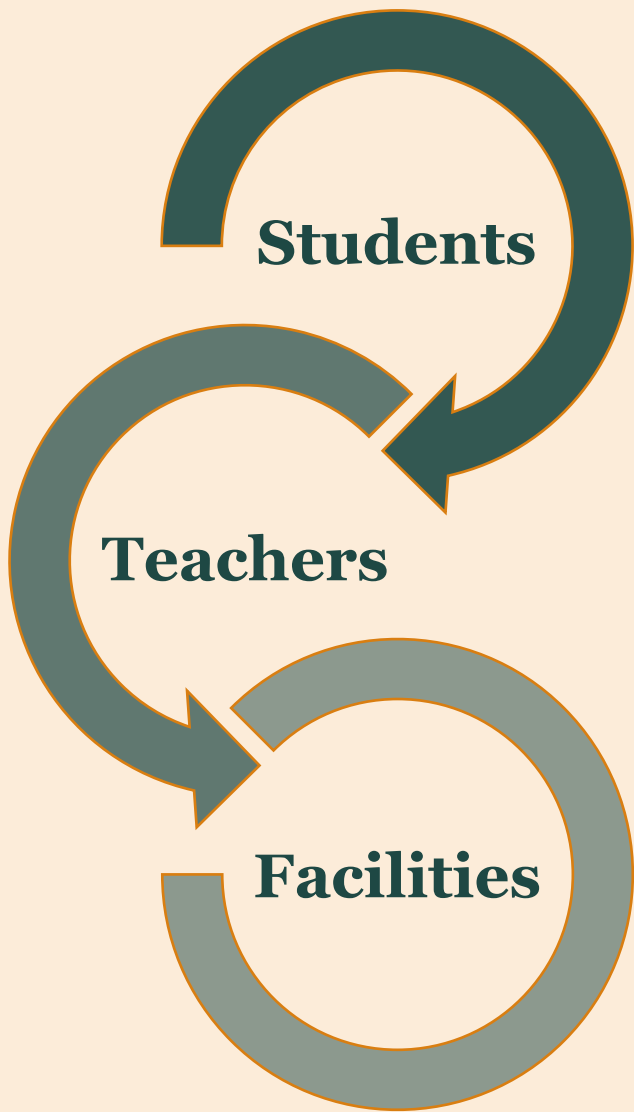
State Charter Schools Commission

Enrollment – As a Board Member

Role of Marketing

Student Services & Decision Making

Checkpoints

Potential Consequences of Under-Enrollment and Over-Enrollment

QUESTIONS

SCSC Comprehensive Performance Framework (CPF)

SCSC Evaluation Tool:
Comprehensive Performance Framework (CPF)

- In 2016, the SCSC adopted a Comprehensive Performance Framework (CPF) to set forth clear, quantifiable, rigorous, and attainable goals in the areas of academic achievement, financial viability, and operational compliance.

- A school's performance on the CPF informs SCSC decision-making over the course of the charter term and at renewal.

Visit for more information:
- SCSC CPF Webpage
- SCSC Renewal Webpage

State Charter Schools Commission

scsc.georgia.gov

CPF Standards

The three areas of performance covered by the framework—academic achievement, financial management, and operational compliance— correspond directly with the three components of a strong charter school.

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 in the district?

2. *Financial Performance*: Is the school financially viable?

3. *Operational Performance*: Is the organization effective, compliant, and well run?

Academic Performance

Academic Metrics Within the CPF

The College and Career Readiness Performance Index (CCRPI):
The CCRPI is the official state accountability metric for public schools in Georgia. CCRPI Content Mastery Scores and CCRPI Progress Scores are weighted equally within the CPF, as is the CCRPI Grade Band Score, which incorporates content mastery, progress, readiness, gap closure, and graduation rate where relevant.

The Value-Added Model (VAM):
The VAM is a statistical, predictive measure used to assess state charter schools based on their ability to positively impact the unique student populations they serve.

Academic Measure (start 2024-2025 school year)

Grade Band School Scores:

1. CCRPI Content Mastery Scores
2. CCRPI Progress Scores
3. CCRPI Grade Band Scores
4. SCSC Value-Added Impact Scores

- Exceeds- outperforms the school comparison by 10 or more points on any one or combination of measures across all grade bands.
- Meets- outperforms the school comparison by at least 1 point on any one or combination of measures across all grade bands.
- Approaches- No more than 2 points below the school comparison on any one or combination of measures across all grade bands.
- Varied- outperforms the school comparison in one grade band(s) and performs more than 2 points below the school comparison in the other grade band(s)
- Does Not Meet- performs below the school comparison in all grades bands served.

Note: Value-Added Impact scores are not points-based. If the school has a statistically significant higher score than the comparison, it will be considered "Exceeding" standards for that grade band. If it is statistically significantly lower, it will be designated "Does Not Meet."

Academic Data Example

	Grades Band	State Charter School Score	School Weighted Comparison Score	Outperform?
CCRPI Content Mastery	E	68	69	No
	M	67	66	Yes
	Grades Band	State Charter School Score	School Weighted Comparison Score	Outperform?
CCRPI Progress	E	84	80	Yes
	M	80	80	No

Does School A meet SCSC Academic Standards?

Yes!

Accountability Comparisons based on Actual Enrollment

District Weighted Comparison Score

- The district's score will be compared to a weighted score of proportion of students from the districts in which the charter school enrolls. Determined from the GaDOE Data Collections System Address Report.

School Weighted Comparison Score

- The school's score will be compared to a weighted score of proportion of students from the <u>schools</u> in which the charter school enrolls. Determined from GaDOE Data Collections Student Record Address Report.

State Charter Schools Commission

scsc.georgia.gov

Academic Data

1. Content Mastery- Achievement scores on Georgia Milestones and GAA
2. Progress- Progress scores (SGP) on Georgia Milestones and Access for ELLs
3. Readiness- includes Lexile scores as derived from ELA scores on Georgia Milestones
   - Attendance and percent of students passing beyond the core courses
4. Closing Gaps- Meeting performance targets based on Georgia Milestones proficiency rates
5. Graduation Rate- 4-yr. and 5-yr. cohort rates

To get renewed, the school must meet academic goals defined in the charter contract.
- Academic goals rely on Georgia Milestone Assessment (GMA) results, the mandatory statewide summative assessment, EOG and EOC scores that are only released once as year.
- The GMA System is aligned to the Georgia Standards of Excellence (GSE).
- Interim/benchmark assessments are a known method for tracking progress on summative assessments.

Thus, the board should monitor progress on interim assessments that are aligned with the GMA & GSE.

VAM Controls

Student-level controls
- Prior-year test scores,
- Gender,
- Foreign-born indicator,
- Race/Ethnicity,
- ESOL enrollment,
- Free/reduced-price lunch eligibility,
- Gifted status,
- Primary-language-not-English indicator,
- Disability status (fifteen specific disability categories),
- Number of schools attended in the current year,
- An indicator for students who changed schools from the prior year,
- Number of disciplinary incidents in the prior year,
- Attendance in the prior year, and
- The difference between a student's age (in months) and the modal age of students in the same grade (i.e. "overage" in grade).
- Previously withdrawn for reasons identified as risk factors
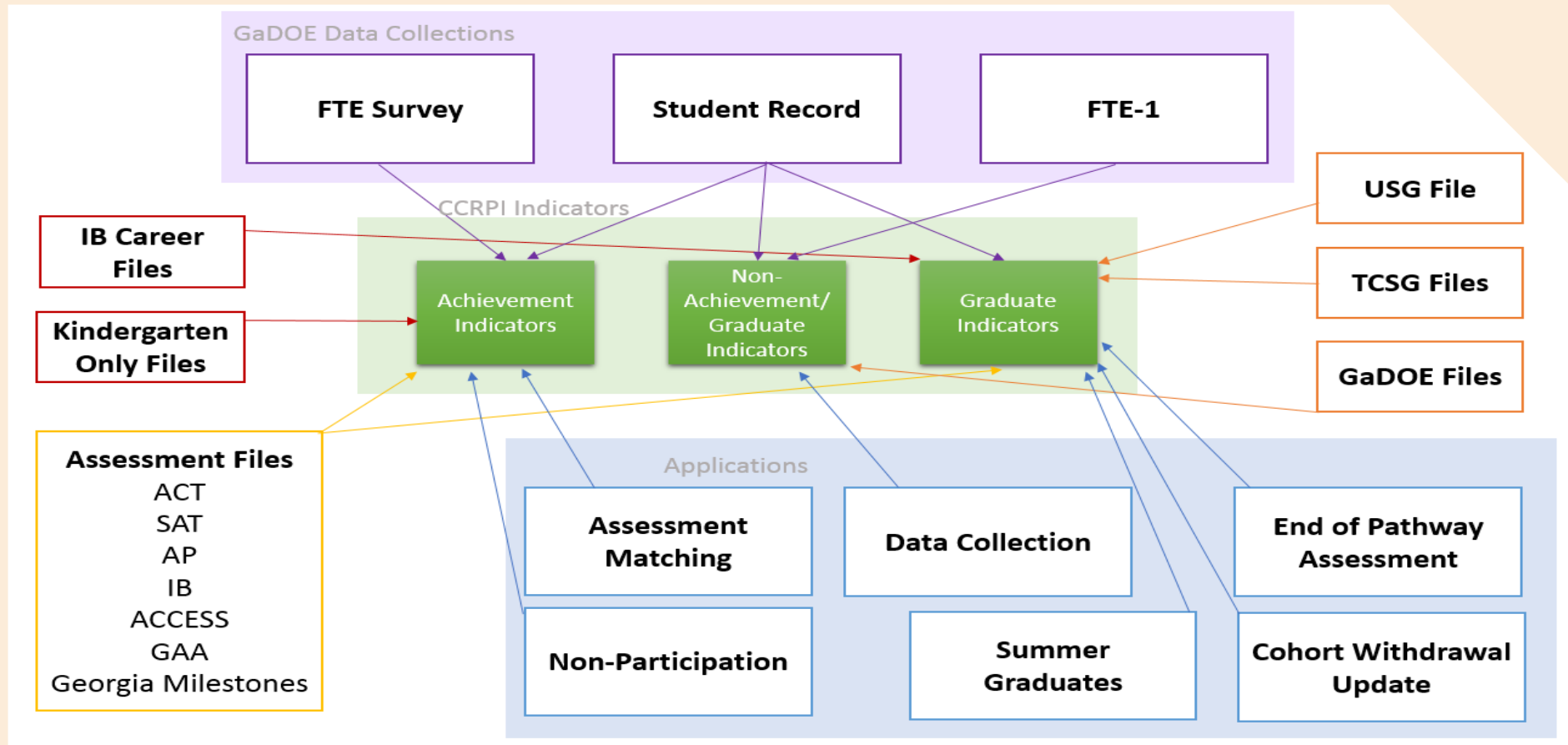- Late enrollees

School-level controls- the proportion of
- Directly Certified students
- Limited English Proficiency students
- Student with Disabilities

State Charter Schools Commission

scsc.georgia.gov

Data Reporting

Academic Metrics Within the CPF

Schools may satisfy annual academic requirements by outperforming the school comparison zone on <u>any one or combination of academic metrics</u> in all relevant grade bands:

- **CCRPI Content Mastery,**
- **CCRPI Progress,**
- **CCRPI Grade Band Score,**
- **Value-Added Impact Score**

State Charter Schools Commission

Advice to the Board

- Understand the data that go into the academic scores

- Ensure school staff are adequately trained to submit all GaDOE data collections

- Track academic progress regularly

- Identify when results are not meeting expectations

- Support school leader to make changes to education program when needed

- Hold school leaders accountable for results

scsc.georgia.gov

SCSC
State Charter Schools Commission of Georgia

Financial Performance

State Charter Schools Commission

Financial Metrics

Fundamental Question: Is the school fiscally responsible and financially viable?

Schools may satisfy annual financial requirements by demonstrating adequate performance on the following near-term financial health and long-term sustainability measures:

- ✓ Current ratio
- ✓ Unrestricted days cash
- ✓ Debt to income ratio

- ✓ Default on debt
- ✓ Efficiency margin
- ✓ Debt to asset ratio

AND by demonstrating adequate fiscal management and oversight as measured by adherence to the following:

- ✓ GAAP standards
- ✓ Federal financial requirements
- ✓ Local Units of

Administration
- ✓ School policies
- ✓ Enrollment variance
- ✓ Audit submission timeline

State Charter Schools Commission

Measure

Calculation

CPF Indicator 1

The Math

- 1a Current Ratio
- Current assets/current liabilities

- 1b Unrestricted Days Cash
- Unrestricted cash/(Total expenses/365)

- 1c Annual Debt to Income Ratio
- Total annual debt payments/Total revenue

- 1d Default on Debt
- No default of loan covenants, not delinquent with debt service or no outstanding debt

- 1e Efficiency Margin
- (Change in net assets + change in pension-related accounts)/Total revenues

- 1f Debt to Asset Ratio
- (Total liabilities – deferred pension liability)/Total assets

Overall Scoring

Near-term and sustainability measures TOTAL 100:

CPF Points

- [ ] Current ratio (15 pts)
- [ ] Unrestricted days cash (20 pts)
- [ ] Debt to income ratio (20 pts)
- [ ] Default on Debt (10 pts)
- [ ] Efficiency margin (15 pts)
- [ ] Debt to asset ratio (20 pts)

Management and oversight measures - TOTAL 100:

CPF Points

- [ ] GAAP standards (20 pts)
- [ ] Federal financial requirements (15 pts)
- [ ] Local Units of Administration (15 pts)
- [ ] School policies (20 pts)
- [ ] Enrollment variance < 3% (10 pts)
- [ ] Audit submission timeline due Nov 1 annually (20 pts)

Practical Considerations & Common Problems

Create your own tracking mechanism.

You should know how the school is trending on each metric throughout the year.

Common Problem Enrollment Variance

Particularly hard for first-year schools but incredibly important

- **Enrollment = Revenue**
- **Forward Funding and Lagging Funding**

Common Problem Debt

Too much debt relative to assets and revenue

Debt covenants that may be contrary to best interests and hard to maintain

Overall Scoring

Meets Standards	80-100 points
Approaches Standards	70-79 points
Does Not Meet Standards	0-69 points

✓ A school must earn a "Meets Standard" designation on Indicator 1 & Indicator 2 to receive an overall "Meets Financial Standards"

✓ If a school earns a "Does Not Meet" on both Indicator 1 and Indicator 2, it will receive an overall "Does Not Meet Financial Standards"

✓ Any other combination of points/ratings will result in an Approaches Financial Standards" designation

Operational Performance

State Charter Schools Commission

scsc.georgia.gov

Is the organization effective, compliant, and well-run?

Purpose of Evaluating Operations Performance

Promote high-quality charter schools by identifying compliance concerns.

Incentivize compliance.

Require high standards of accountability for charter schools.

Determine whether charter schools are organizationally effective, compliant, and well run.

SCSC Monitoring Activities

Operations Monitoring- (one data source contributing to Operations CPF score)

Financial Monitoring- (one data source contributing to Financial CPF score)

Health and Safety Facility Visits-(results included in operations monitoring)
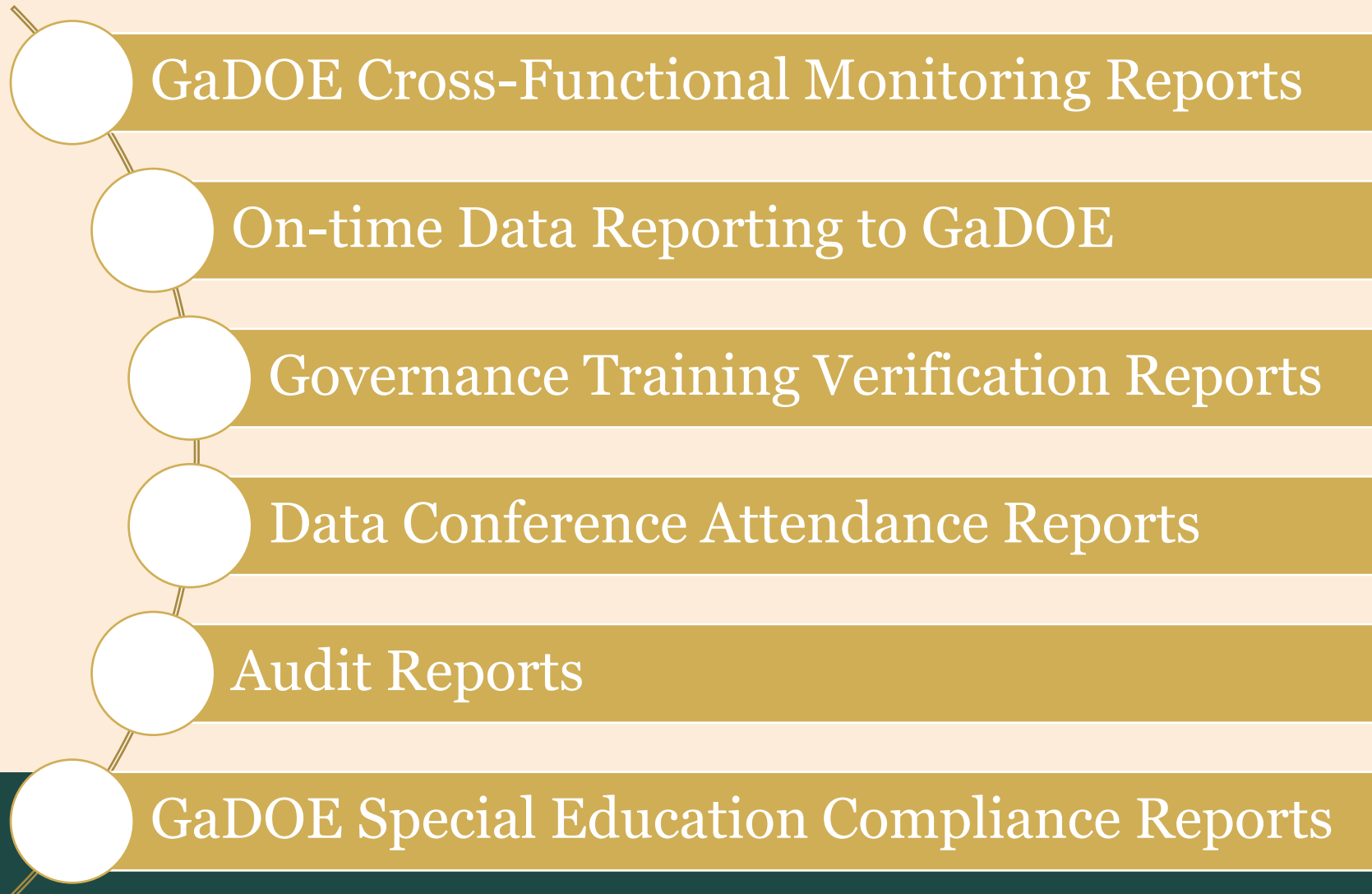
Unannounced Facility Visits-(on going compliance review as needed)

Website Monitoring-(results included in operations monitoring)

Governing Board Monitoring-(on going compliance monitoring as needed)

High-Risk Financial Monitoring-(on going compliance monitoring as needed)

Data Sources Outside of SCSC Operations Monitoring factored in the CPF Operations Score

- GaDOE Cross-Functional Monitoring Reports
- On-time Data Reporting to GaDOE
- Governance Training Verification Reports
- Data Conference Attendance Reports
- Audit Reports
- GaDOE Special Education Compliance Reports

State Charter Schools Commission

scsc.georgia.gov

# Operations Monitoring: Policy, Procedure, and Practice Review

SCSC's policy, procedure and practice review evaluates compliance with Section III of the CPF.

- ❏ Indicator 1- Education Program Compliance
- ❏ Indicator 2-Governance, Ethics, and Transparency
- ❏ Indicator 3-Obligations to Students
- ❏ Indicator 4-Employer Obligations
- ❏ Indicator 5-School Environment
- ❏ Indicator 6-Additional Obligations and Continuing Obligations

Each year, staff re-evaluates monitoring areas to account for new laws and to ensure monitoring activities continue to reflect whether the school is **effective, compliant, and well-run.**
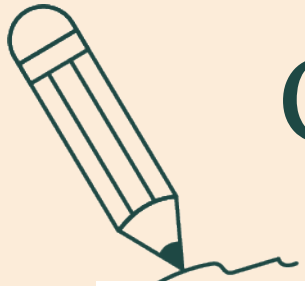
CPF Scoring Categories - Operations

Meets Standards	80-100 points
Approaches Standards	70-79 points
Does Not Meet Standards	0-69 points

Scope of Operations Monitoring

Based on the state fiscal year.

*Operational Fall 25-July 1, 2025-June 30, 2026

Comprehensive Performance Framework (CPF) "Section III. Operational Performance."

Measures compliance with laws, rules, regulations, and charter contractual obligations.

# Tips for Successful Operations Performance

- Consult SCSC **Monitoring Resources**
- Consult SCSC **Operations Guidance**
- Review SCSC **Monitoring Handbook**
- Review SCSC **LEA Legal Obligations Guidance**
- Meet all GaDOE and SCSC Data Reporting Deadlines
- Ensure Governing Board members attend Governance Training
- Comply with all terms of the Charter Contract
- Attend SCSC Monitoring Webinar
- Attend GaDOE Federal Programs Training
- Ensure federal program funding compliance
- Establish and maintain an accurate record-keeping process for all federal programs and school policies and procedures
- Seek technical assistance when and where needed
- Plan and work collaboratively with the school leadership and governing board teams
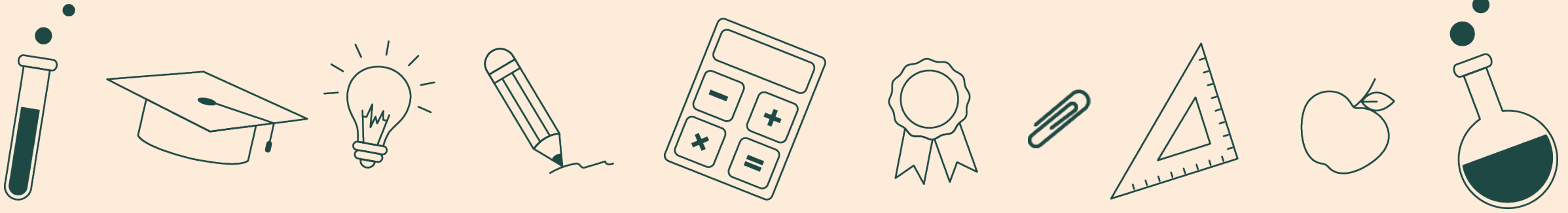
Questions?

Final Thoughts
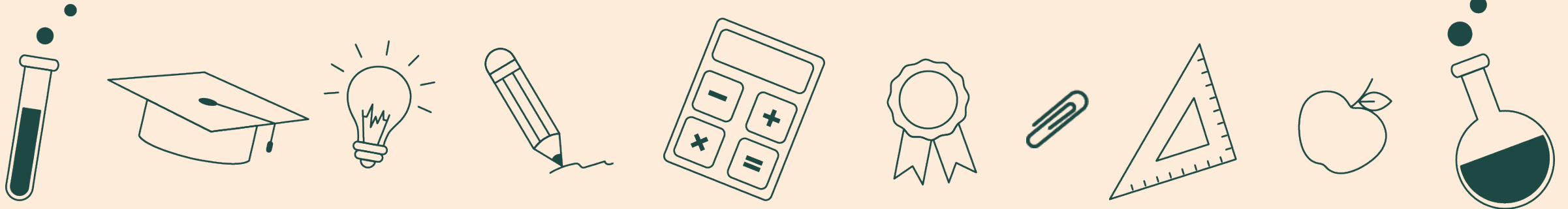
Contact Us

Website: scsc.georgia.gov

Twitter: @SCSCGa

Address: 504 Twin Towers West,
205 Jesse Hill Jr. Dr., SE,
Atlanta, GA 30334

Phone: (404) 656-2837