



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 Ed. (Note: Foothills went on to enter into a very similar replication agreement with what would become the Coastal Plains Charter HS governing board.)

(cont’d on next page)

Charter School Expansion

<i>Expansion</i>	Growing an existing school by significantly increasing student enrollment, adding one or more grades, or adding an additional campus/site.
<i>Expansion and Charter Contracts</i>	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.
<i>Expansion and Board Governance</i>	<p>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.</p> <ul style="list-style-type: none">• 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 <u>expansion</u> 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 <i>opening a new school</i> based on the educational model of an existing high-quality charter school.	Expansion means <i>growing an existing school</i> 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	<p>Two (or more) Schools:</p> <ol style="list-style-type: none"> 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. 	<p>One School:</p> <p>An existing high-quality charter school increases its offerings to students by adding grades, increasing student enrollment, adding a campus, or any combination thereof.</p>
CHARTER CONTRACT	<p>Two (or more) Charter Contracts:</p> <ol style="list-style-type: none"> 1) The existing high-quality charter school continues to operate under its current charter contract; AND 2) The new school is authorized under a separate charter contract that holds the new school accountable for its performance. 	<p>One Charter Contract:</p> <p>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.</p>
GOVERNING BOARD	<p>One, Two, or More Boards:</p> <p>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.</p> <p>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.</p>	<p>One Board:</p> <p>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.</p>
SCHOOL ACCOUNTABILITY	<p>Separate Accountability:</p> <p>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.</p>	<p>Single Accountability:</p> <p>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.</p>

<p>FINANCIAL ACCOUNTING</p>	<p>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.</p>	<p>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.</p>
<p>PROCESS</p>	<p>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.</p> <p>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.”</p> <ul style="list-style-type: none"> • 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). • 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 <i>concurrently</i> by the SCSC AND the local district.) <p>Please visit our website for more information about the SCSC’s Expedited Review Process. 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.</p>	<p>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 here.</p>

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 new 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 *could also choose to replicate* 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-winning STEM program implemented by Monty Hall Academy to **only** 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 than 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.