



Charter School Authorizer Evaluation Report
Achievement School District
2020 Pilot

Charter School Authorizer Evaluation Report: 2020 Pilot

Authorizer: Achievement School District

About the 2020 Pilot:

In 2019, the General Assembly charged the State Board of Education (State Board) with conducting periodic evaluations of authorizers to determine authorizer compliance and evaluate quality. Tennessee is the fourth state in the U.S. to implement authorizer evaluations and the State Board partnered with SchoolWorks, an education consulting group with experience in authorizer evaluations, to develop an evaluation system based on the State Board's [Quality Charter Authorizing Standards](#).

As part of the development process, the State Board gathered feedback from operators, authorizers, and charter school stakeholders on its Quality Charter Authorizing Standards, conducted focus groups to review feedback, connected with the three other states that have an established authorizer evaluation system, and established a task force that included authorizers and operators to share in the development of the evaluation process. After building the process, guidance documents, and evaluation rubric, the State Board focused on the first true test of its work – the Fall 2020 pilot evaluation.

Participation in the pilot was encouraged, yet voluntary, and open to all authorizers. Metropolitan Nashville Public Schools (MNPS) and the Achievement School District (ASD) took advantage of the opportunity and opted into a full evaluation as part of the pilot. The State Board celebrates these authorizers for their willingness to participate. The pilot evaluation was an opportunity for the State Board, MNPS and the ASD to gain valuable feedback and further refine practices without risk of consequence. Additionally, authorizing staff from Shelby County Schools, MNPS, and the newly formed Tennessee Public Charter School Commission elected to participate as an evaluator during the pilot evaluations. Authorizing staff will continue to have the option to serve as an evaluator during any evaluation that is not their own. The option to serve as an evaluator is another opportunity for authorizers to gain deeper insight into the evaluation process and connect with fellow authorizers on their processes and practices.

This evaluation report shares the results of the ASD's pilot evaluation with an important caveat – the outcomes provide meaningful feedback and an opportunity for reflection ahead of the formal evaluations beginning in Fall 2021. The outcomes shall not be received as punitive or an opportunity to diminish the processes and systems currently in place, but rather a necessary component of a formative process. Since the establishment of the State Board's Quality Charter Authorizing Standards in 2018, the State Board believes it is our responsibility to work together with our authorizers to further align to the standards. The ASD's willingness to participate in the pilot evaluations demonstrates their commitment to the standards and continuous improvement.

As a result of this pilot and pursuant to State Board rule that is scheduled for final approval by the State Board at its February 5, 2021 Board meeting, the State Board is prepared to implement its formal evaluation of authorizers beginning in Fall 2021.¹ Updates to the State Board's evaluation materials will reflect lessons learned from the pilot, including further clarification of what's required of an authorizer during an evaluation as well as how to evaluate an authorizer's documentation against the Quality Charter Authoring Standards. These materials will continue to evolve over time as our authorizers strengthen their practices. The pilot served as a valuable step to prepare the State Board and Tennessee authorizers for the official Fall 2021 high stakes authorizer evaluations. The State Board believes that quality authorizing leads to quality charter schools and increased educational opportunities for students, which is the ultimate goal of the authorizer evaluations.

¹ State Board rule 0520-14-01-.08 is anticipated to become effective before formal evaluations begin in Fall 2021.

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Evaluation Schedule

Pilot evaluations were conducted in Fall 2020 with the results serving as a baseline to gauge thresholds for overall ratings in subsequent evaluations. Once the final State Board rule regarding authorizer evaluations becomes effective, the State Board will begin formal evaluation of authorizers in Fall 2021. Evaluations will be staggered and occur bi-annually—three (3) authorizers will be evaluated in school year 2021-22 and three (3) authorizers will be evaluated in 2022-23; a two-year evaluation sequence repeats into the future.

The Cohort Evaluation Schedule

School Year	Authorizers
2020-21	<i>PILOT</i> <ul style="list-style-type: none"> ○ Metro Nashville Public Schools ○ Achievement School District
2021-22	<ul style="list-style-type: none"> ○ Shelby County Schools ○ Knox County Schools ○ Hamilton County Schools
2022-23	<ul style="list-style-type: none"> ○ Tennessee Public Charter School Commission ○ Metro Nashville Public Schools ○ Achievement School District

Evaluation Process

The evaluation is based on the 24 Tennessee Quality Charter Authorizing Standards organized in six (6) categories: Agency Commitment and Capacity; Application Process and Decision Making; Performance Contracting; Ongoing Oversight and Evaluation; Revocation and Renewal Decision Making; and Advanced Standards. The evaluation process rating is based on the evaluation team’s consideration of standards with the Advanced Standards category providing the opportunity for bonus points.

Characteristics of the Process:

- The evaluation team included authorizer representatives, an outside consultant, and State Board staff. A Quality Editor evaluated and verified the evidence and rating for each standard.
- The evaluation team objectively evaluated the evidence for the authorizer by comparing it against the rubric.
- Evidence considered for the evaluation was limited to the documents submitted by the authorizer, the school leader interview, and the documentation debrief with the authorizer. Beginning with the first formal evaluation in 2021, the State Board will also consider any findings and recommendation reports and final decisions for any appeals that occurred within the two-year review term.

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- Evaluators defaulted to a rating of zero (0) – the lowest score – when no documents or verbal evidence was provided for a given standard. Evaluators examined all evidence and determined which performance level of the rubric best represented the authorizer’s practice and assigned each standard a rating of zero (0) through four (4) as represented in Table 1.
- The final product of each evaluation is a completed Tennessee Authorizer Evaluation Report that includes final scores and evaluative comments for each standard of the rubric, an overall evaluation rating, as defined in Table 2, and any required follow-up actions. While the Fall 2020 pilot evaluation included final scores, evaluative comments and an overall evaluation rating, authorizers did not receive any required follow-up actions.
- The evaluative comments provide brief statements to describe the nature of the documented evidence in relation to each sub-standard of the rubric. Comments also note cases in which the authorizer did not provide relevant documents.
- While the State Board and SchoolWorks developed the process to ensure a consistent and normed evaluation, evaluations of the 24 rubric standards were conducted solely by the evaluation team and represent an independent evaluation of the authorizer’s practices in relation to the standards in the rubric.

Table 1. Standard Ratings

0	1	2	3	4
Verbal Evidence and/or Documentation DOES NOT Address <u>or</u> Satisfy the Standard	Verbal Evidence and/or Documentation Addresses <u>and</u> Satisfies LESS THAN 50% of the Standard	Documentation Addresses MOST but Satisfies LESS THAN 50% of the Standard	Documentation Addresses <u>and</u> Satisfies MOST of the Standard	Documentation Addresses <u>and</u> Satisfies ALL of the Standard

Table 2. Overall Ratings

Score	Rating
3.50 – 4.00	Exemplary
3.00 – 3.49	Commendable
2.00 – 2.99	Satisfactory
1.00 – 1.99	Approaching Satisfactory
0 – 0.99	Unsatisfactory/Incomplete

Executive Summary:

General Information	
Authorizer:	Achievement School District (ASD)
About the Authorizer:	The ASD is a state-level authorizer within the Tennessee Department of Education that was established by law in 2011 to serve as an intervention for some of the state’s lowest performing schools. The ASD authorizes charter schools in Shelby County and Davidson County. While the ASD is considered an authorizer in Tennessee pursuant to T.C.A. § 49-13-104, the ASD operates under additional legal provisions that do not apply to other authorizers.
# Operational Schools: # Students Enrolled:	21 schools in the 2019-20 school year <i>11,166 students in the 2019-20 school year</i>
# Approved School(s) in Development (planned opening year):	0 schools in development
Closed Schools (name and year closed):	0 schools closed since September 1, 2018
Evaluation Summary	
<p>Key Areas of Strength in the Evaluation:</p> <ul style="list-style-type: none"> • While the authorizer’s RFP process has not been implemented since 2016, the authorizer’s prior process and application materials were of high-quality and developed in collaboration with the National Association of Charter School Authorizers (NACSA) and in alignment with State Board policy. • The authorizing office appears adequately staffed given the size of its portfolio and its core authorizing team recently renewed its membership with a national association of charter school authorizers (specifically, NACSA), which demonstrates a commitment to professional development and a focus on quality authorizing. • The authorizer developed several special populations manuals which provide the policies, guidelines and responsibilities of its charter schools serving special populations of students. <p>Key Areas of Concern in the Evaluation:</p> <ul style="list-style-type: none"> • The authorizer lacked evidence of any public reporting (i.e. authorizer fee report, authorizer report) as required by state law and State Board rule. • The authorizer did not submit evidence of an executed performance framework or documentation showing how the authorizer measures performance and holds its schools accountable to the terms of its charter agreement. • The authorizer has no evidence of revocation, renewal and non-renewal processes, including the policies or criteria that guide evaluation and inform any decisions. 	

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Overall Ratings Summary:

Standard		Rating (0-4)	Section Average
1a	Planning and Commitment to Excellence	2	1.67
1b	Human Resources	2	
1c	Financial Resources	1	
2a	Application Proposal Information, Questions, and Guidance	2	2.00
2b	Fair, Transparent, Quality-Focused Procedures	2	
2c	Rigorous Approval Criteria	2	
2d	Rigorous Decision Making	2	
2e	Elements for Existing School Operators or Replicators (if applicable)	2	
2f	Elements for Applicants Proposing to Contract with Educational Service Providers, including Charter Management Organizations (if applicable)	2	
3a	Charter Agreement Term, Negotiation, and Execution	2	2.00
3b	Rights and Responsibilities	2	
3c	Performance Standards	2	
3d	Provisions for Educational Service Provider (ESP) Contracts (if applicable)	N/A	
3e	ESP Contracts Additional Provisions.	N/A	
4a	Performance Evaluation and Compliance Monitoring	2	1.60
4b	Respecting School Autonomy	3	
4c	Protecting Student Rights	2	
4d	School Intervention	1	
4e	Public Reporting	0	
5a	Revocation	0	1.00
5b	Renewal Decisions Based on Merit and Inclusive Evidence	1	
5c	Cumulative Report and Renewal Application	1	
5d	Fair, Transparent Process	1	
5e	Closure	2	
6a	Advanced Standard (Bonus)	1	1.00
Overall Rating		1.61 Approaching Satisfactory	

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A note about the ASD's Pilot Evaluation Report:

Each evaluation centers around a specific review term that includes the two years immediately leading up to an evaluation. In this instance, the review term includes documentation between September 1, 2018 and August 31, 2020. Given that the authorizer submitted documentation that exists outside of the review term, several documents were unable to fully satisfy the criteria of the standard and are noted as such with an **asterisk (*)**. In a formal evaluation, standards with documentation that falls outside of the review term would earn a score of zero (0), absent of circumstances that are unique to the authorizer. However, as this is a pilot evaluation, the authorizer received feedback on all documentation provided, including the documentation that fell outside of the review term.

PILOT

Standard 1a - Planning and Commitment to Excellence							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i. Supports and advances the purposes of charter school law.				X			
ii. Ensures that the authorizer’s local Board of Education or Authorizing Board, leadership, and staff understand and are committed to the quality charter authorizing principles and standards and developing as authorizing professionals.		X		X			
iii. Defines external relationships and lines of authority to protect its authorizing functions from conflicts of interest and political influence.							
iv. Implements policies, processes, and practices that streamline and systematize its work toward stated goals and executes its duties efficiently while minimizing administrative burdens on schools.			X	X			
v. Evaluates its work regularly against national and State standards for quality authorizing and recognized effective practices and develops and implements timely plans for improvement when necessary.							
vi. States a clear mission for quality authorizing.				X	X		
vii. Makes authorizing decisions that will result in positive student outcomes, in accordance with State law.							
0 <i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	1 <i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	2 <i>Documentation:</i>	3 <i>Documentation:</i>	4 <i>Documentation:</i>			
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards			
• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards			
Rating			0	1	2	3	4
					X		

Evaluative Comments:

- i. *While the authorization overview includes a stated goal to move the bottom 5% of schools to the top 25% within five (5) years and emails demonstrate three (3) schools exiting the Priority School List in 2019, there is no further documentation to ascertain advancing purposes 1, 2, or 4 of the charter school law. Furthermore, while a 2015 charter application demonstrates solicitation of innovative learning models and the 2016 School Performance Framework (SPF) demonstrates greater decision-making authority in exchange for accountability, no further documentation supports implementing the accountability framework or how the authorizer is supporting or advancing purposes 5 and 6 of the charter school law.
- ii. *The authorizer training documentation from 2015 demonstrates alignment to the Tennessee Association of Charter School Authorizers' principles and standards rather than the Tennessee State Board of Education's (State Board) Quality Authorizing Standards that were established in 2018. Furthermore, while the authorizer stated during the document debrief that the team has renewed its membership with the National Association of Charter School Authorizers (NACSA), no further documentation was provided to make evident that the Authorizing Board, leadership and staff understand and are committed to the State Board's principles and standards or are developing in their authorizing expertise.
- iii. No documentation was provided to show how the authorizer is protecting its functions from conflicts of interest and political influence.
- iv. *While the authorization overview states the authorizer's goals and the document request guidebook demonstrates minimizing administrative burden while requesting information of its schools related to the SPF, no further documentation was submitted to demonstrate that the goals have been updated since 2016 or how the authorizer implements policies and practices such as site visits or annual evaluation reporting as part of its SPF accountability.
- v. No documentation was provided to demonstrate how the authorizer evaluates its work against state and national standards for quality authorizing or to demonstrate developing and implementing timely plans for improvement.
- vi. The authorizer has the following written mission statement: "The Achievement School District authorizes charter schools committed to academic excellence, equity, and social-emotional development for all students."
- vii. *Beyond one (1) approved application from 2015, no documentation related to authorizing decisions (e.g., portfolio outcomes, expansions granted, closing school performance) was submitted.

Standard 1b – Human Resources							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i. Through intra- or inter-agency collaborations, contractual relationships and/or staff enlists expertise and competent leadership for all areas essential to charter school oversight—including, but not limited to: education leadership; instruction; assessment; local community needs; special education, English learners and other diverse learning needs; performance management and accountability; law; finance; facilities; and nonprofit governance and management.		X	X	X	X		
ii. Employs competent personnel at a staffing level appropriate and sufficient to carry out all authorizing responsibilities in accordance with national and State standards, and commensurate with the scale of the charter school portfolio.		X	X	X			
iii. Demonstrates an ongoing commitment to developing and retaining authorizing staff members and provides regular professional development for the agency’s leadership and local Board of Education or Authorizing Board to achieve and maintain high standards of professional authorizing practice and to enable continual agency improvement.		X					
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards			
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Rating			0	1	2	3	4
					X		
Evaluative Comments:							

Standard 1c - Financial Resources					
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>
i.	Determines the financial needs of the authorizing office and devotes financial resources to fulfill its authorizing responsibilities in accordance with national and State standards, commensurate with the scale of the charter school portfolio, and in accordance with Tennessee statute, including all relevant requirements for use of the authorizer fee.	X	X		
ii.	Structures its funding in a manner that avoids conflicts of interest, inducements, incentives, or disincentives that might compromise its judgment in charter approval and accountability decision making.	X	X		
iii.	Deploys funds effectively, transparently, and efficiently with the public and student interests in mind.	X	X		
iv.	Annually reports the authorizing obligations fulfilled using the authorizer fee in accordance with State law.	X	X		
0	1	2	3	4	
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	
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				0	1
					X
				2	3
					4
Evaluative Comments:					

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- i. While the narrative and financial status report confirm the collection of an authorizer fee, documentation does not demonstrate how the authorizer determines the financial needs of its office or how it devotes financial resources to fulfill its authorizing responsibilities through an authorizer budget or fee report.
- ii. While there do not appear to be conflicts of interest with regard to funding and the authorizer explained in the narrative and document debrief that the authorizer fee is used to fund personnel and supports for its schools, no budget or authorizer fee reports were submitted to confirm the funding structures.
- iii. While the narrative describes providing comprehensive supports with costs that exceed the funds available through the authorizer fee, no authorizer fee report or authorizing budget was provided to ascertain how funds are deployed.
- iv. While the narrative describes completing an annual report that details the services provided to charter schools as of the 2019-20 fiscal year, no such report was submitted.

Standard 2a - Application Proposal Information, Questions, and Guidance							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i. Issues a charter application information packet or request for proposals (RFP) that: a. States any chartering priorities the authorizer may have established; b. Presents comprehensive application questions to elicit the information needed for rigorous evaluation of applicants' plans and capacities; and c. Provides clear guidance and requirements regarding application content and format, while explaining evaluation criteria.		X	X	X			
ii. Welcomes proposals from first-time charter applicants, as well as existing school operators/replicators, while appropriately distinguishing between the two kinds of applicants in proposal requirements and evaluation criteria.		X	X	X			
iii. Encourages expansion and replication of charter schools that demonstrate academic success, financial viability, organizational health, and capacity for growth.		X	X	X			
iv. Considers diverse educational philosophies and approaches.			X	X			
v. Requires applicants to demonstrate capacity to serve students with diverse needs, such as students with disabilities or learning exceptionalities and English learners.			X	X			
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
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Rating			0	1	2	3	4
					X		
Evaluative Comments:							

- i. *While the request for proposals (RFP), applicant guidebook, and applicant due diligence documentation collectively meet the criteria of the sub-standard through a clear statement of its chartering priorities, comprehensive application questions, and clear application guidance, the documentation does not include the approval criteria, such as an evaluation rubric or similar material.
- ii. *While the RFP demonstrates that the authorizer welcomes proposals from first-time charter applicants and existing operators and distinguishes between the two through the application questions, no further documentation was submitted demonstrating the approval criteria, such as an evaluation rubric or similar material.
- iii. *While the kick-off communication and notice of intent to apply demonstrate encouragement of expansion and replication, the notice of intent to apply form only includes a track record of academic success and not financial viability, organizational health, and capacity for growth.
- iv. *While the applicant questions included in the RFP demonstrates how the authorizer considers diverse education philosophies and approaches, an evaluation rubric is not provided to ascertain consideration of diverse approaches upon evaluation.
- v. *While the questions included in the RFP requires applicants to demonstrate capacity to serve students with diverse needs, an evaluation rubric was not provided to confirm inclusion as an approval criterion.

Standard 2b - Fair, Transparent, Quality-Focused Procedures.										
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>					
i.	Implements a charter application process that is open, well-publicized, and transparent, and is organized around clear, realistic timelines.	X	X	X						
ii.	Allows sufficient time for each stage of the application and school pre-opening process to be carried out with quality and integrity.	X	X	X						
iii.	Explains how each stage of the application process is conducted and evaluated.	X	X	X						
iv.	Communicates the education needs of the district, the charter authorizing processes, approval criteria, and decisions clearly to the public.	X	X	X						
v.	Informs applicants of their rights and responsibilities and promptly notifies applicants of approval or denial, while explaining the factors that determined the decision so that applicants can decide if they wish to revise their plans based in part on that information and resubmit in the future.									
0		1		2		3		4		
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>		<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>		<i>Documentation:</i>		<i>Documentation:</i>		<i>Documentation:</i>		
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						0	1	2	3	4
<i>Rating</i>								X		
Evaluative Comments:										
i. *While the RFP demonstrates that the authorizer implemented a charter application process that was open, transparent, and organized with clear and realistic timelines, no further documentation was provided to demonstrate that the process was well-publicized to interested applicants.										
ii. *While the timeline update document outlines a three-phase process over five (5) months for schools opening in Fall 2016 with decisions made early enough to afford approved applicants more than a year of additional planning prior to opening, the documented process has not been implemented since 2016.										
iii. *While the authorization overview explains how each stage of the application process is conducted and evaluated by defining what is involved in each step and who is responsible for decisions within the process, the approval criteria were not provided.										

Standard 2c - Rigorous Approval Criteria							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i. Requires all applicants to present a clear and compelling mission, a quality educational program, a demonstration of community support, a solvent and sustainable budget and contingency financial plans, a clear demonstration of the effectiveness of the model for the target student population, effective governance and management structures and systems, founding team members demonstrating diverse and necessary capabilities in all phases of the school's development, and clear evidence of the applicant's capacity to execute its plan successfully.		X	X	X			
ii. Establishes distinct requirements and criteria for applicants who are existing school operators or replicators.		X	X	X			
iii. Establishes distinct requirements and criteria for applicants proposing to contract with educational service providers (ESPs), including charter management organizations.		X	X	X			
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
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Rating			0	1	2	3	4
					X		
Evaluative Comments:							
i. *While the RFP requires all stipulated aspects of an application, including mission, educational program, community support, budget and financial plans, model effectiveness for population, governance and management, founding team capabilities, and capacity to execute, no updated RFP was provided for the review term.							
ii. *While the RFP includes distinct requirements through the inclusion of specific questions for existing school operators or replicators, the authorizer's documentation does not establish the criteria for approval through the use of a rubric or similar.							
iii. *While the narrative states that the authorizer does not allow operators to contract with an ESP, the RFP requires applicants to answer questions about a potential CMO/ESP and to include any CMO/ESP agreement(s) as an attachment of the charter application.							

Standard 2d - Rigorous Decision Making							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i.	Grants charters only to applicants that have demonstrated competence and capacity to succeed in all aspects of their particular school model, consistent with the stated approval criteria.	X	X	X			
ii.	Rigorously evaluates each application through thorough review of the written proposal, a substantive in-person interview with each qualified applicant, and all appropriate due diligence to examine the applicant's experience and capacity, conducted by knowledgeable and competent evaluators.	X	X	X			
iii.	Engages, for both written application reviews and applicant interviews, highly-competent teams of internal and external evaluators with relevant educational, organizational (governance and management), financial, and legal expertise, as well as thorough understanding of the essential principles of charter school autonomy and accountability.		X	X			
iv.	Provides orientation or training to application evaluators (including interviewers) to ensure consistent evaluation standards and practices, the elimination of real or perceived conflicts of interest, the observance of essential protocols, and the fair, unbiased treatment of all applicants.	X	X	X			
v.	Ensures that the application-review process and decision making are free of conflicts of interest and requires full disclosure of any potential or perceived conflicts of interest between reviewers or decision makers and applicants.		X	X			
vi.	Approves applications that includes a detailed plan for school opening, operation, and fiscal stability, with little substantive work left for later development.		X	X			
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
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Rating			0	1	2	3	4
					X		

Evaluative Comments:

- i. *While the narrative states that the authorizer has rigorous approval criteria for all applicants, the authorizer's documentation does not include a rubric that outlines the approval criteria or any evidence that the authorizer grants charters only to applicants who have met the approval criteria.
- ii. *While the applicant guidance and interview guidance documents make evident how the authorizer rigorously evaluates each application with a timeline and details for what each stage of the review process entails, the process has not been updated or implemented since 2016.
- iii. *While the narrative describes selecting evaluators through a process that is aligned to NACSA standards, no documentation was submitted to evaluate the backgrounds of past or current evaluators.
- iv. *According to the evaluator training and blank conflicts of interest form, the authorizer provides training to evaluators that includes a review of the evaluation process, an opportunity to norm evaluation ratings, and completion of documentation that certifies each evaluator is free of any real or perceived conflicts of interest; however, the authorizer has not updated or engaged in this process since 2016.
- v. *While a blank conflicts of interest form was provided, no completed forms were submitted to demonstrate that the authorizer executes its disclosure forms with all evaluators and decision makers.
- vi. *While the narrative and RFP describe approving applications that are complete and ready for implementation, no documentation was provided for approved applications to ascertain whether criteria related to school opening, operation, and fiscal stability were met.

Standard 2e - Elements for Existing School Operators or Replicators (if applicable).										
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>					
i.	Provide clear evidence of their capacity to operate new schools successfully while maintaining quality in existing schools;		X	X						
ii.	Document their educational, organizational, and financial performance records based on all existing schools;		X	X						
iii.	Explain any never-opened, terminated, or non-renewed schools (including terminated or non-renewed third-party contracts to operate schools);									
iv.	Present their growth plan, business plan, and most recent financial audits;		X	X						
v.	Meet high standards of academic, organizational, and financial success to earn approval for replication; and		X							
vi.	Document any current or past litigation and the resolution of such litigation.									
0		1		2		3		4		
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>		<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>		<i>Documentation:</i>		<i>Documentation:</i>		<i>Documentation:</i>		
• Addresses none of the sub-standards, and		• Addresses less than 50% of sub-standards and		• Addresses 50 to 100% of the sub-standards,		• Addresses 50 to 100% of the sub-standards		• Addresses 100% of the sub-standards		
• Satisfies none of the sub-standards		• Satisfies less than 50% of the sub-standards		• Satisfies less than 50% of the sub-standards		• Satisfies 50 to 99.9% of the sub-standards		• Satisfies 100% of the sub-standards		
						0	1	2	3	4
<i>Rating</i>								X		
Evaluative Comments:										
i. *While the RFP makes evident that existing operators must provide clear evidence of their capacity in both the “scale strategy” and “leadership team” sections of the application, the authorizer’s documentation has not been updated or implemented for this review term.										
ii. *While the notice of intent to apply and RFP documents require existing operators to submit data related to the academic and financial performance of their existing schools, no organizational performance records are requested.										
iii. *The RFP does not demonstrate that existing operators are required to explain any never-opened, terminated, or non-renewed schools in their portfolio.										
iv. *The RFP requests information related to scaling the model to new sites, school-and-network-level budget and financial management information, and historic financial records, including audited financials; however, the RFP has not been updated or implemented for this review term.										

Standard 2f - Elements for Applicants Proposing to Contract with Educational Service Providers, including Charter Management Organizations (if applicable).							
Sub-standards	<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>			
i. Evidence of the service provider’s educational and management success;		X	X				
ii. A description of the process for selecting the ESP;		X	X				
iii. A draft (or existing) service/management contract that sets forth proposed key terms, including roles and responsibilities of the school Governing Board, the school staff, and the service provider; the services and resources to be provided; performance-evaluation measures and mechanisms; detailed explanation of compensation to be paid to the provider; financial controls and oversight; investment disclosure; methods of contract oversight and enforcement; and conditions for contract renewal and termination; and		X	X				
iv. Disclosure and explanation of any existing or potential conflicts of interest between the school Governing Board and proposed service provider or any affiliated business entities.		X	X				
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards			
• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards			
			0	1	2	3	4
		<i>Rating</i>			X		
Evaluative Comments:							

- i. *While the RFP requires applicants to answer questions about a proposed Education Service Provider (ESP), the questions do not include a request for evidence of the service provider's educational and management success.
- ii. *While the RFP asks how and why the ESP was selected, the RFP has not been updated for the review term.
- iii. *While the RFP includes a request for the service management contract as part of the application's attachments, the authorizer's documentation does not include the specific criteria or required terms of the contract.
- iv. *While the RFP includes questions that applicants are required to answer about any existing or potential conflicts of interest, the RFP has not been updated since 2016.

P I L O T

A note about standards 3a-e:

As part of the evaluation process, authorizers are provided with a list of randomly-selected schools to use for the authorizer’s documentation. While this authorizer provided one (1) charter agreement as evidence, the requirement was to provide the charter agreements for the two (2) randomly selected charter schools shared in advance of the evaluation term. Given that this is a pilot evaluation, the evaluation team reviewed and scored the charter agreement that was provided; however, in the formal evaluation, the standards within this section of the evaluation would have been scored as zero (0).

Standard 3a - Charter Agreement Term, Negotiation, and Execution
Sub-standards

Sub-standards	School Leader Interview and/or Document Debrief	Narrative	Documentation addresses	Documentation Fully Satisfies
i. Executes a charter agreement with a legally incorporated Governing Board independent of the authorizer.		X	X	X
ii. Grants charter agreements for an initial term of ten operating years with a high-stakes review every five years, in addition to annual performance reports.	X	X	X	
iii. Defines material and non-material terms of the charter agreement.		X	X	
iv. Ensures mutual understanding and acceptance of the terms of the charter agreement by the school’s Governing Board.		X	X	
v. Allows—and requires charter agreement amendments for—occasional material changes to a school’s plans but does not require amending the charter agreement for non- material modifications.	X		X	

0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards			
• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards			
Rating			0	1	2	3	4
					X		

Evaluative Comments:

- i. The executed charter agreement explicitly names the incorporated Governing Board and the authorizer within the contract.
- ii. While the executed charter agreement makes evident that the authorizer grants ten-year charter terms (1. Grant of Charter) and conducts an annual monitoring visit (3.15 School Performance Framework), no further documentation was provided that demonstrates that an interim review is conducted every five years or that annual performance reports are produced.
- iii. While section 3.1 of the charter agreement defines some material (e.g., changes to curriculum or facility plans) and non-material (e.g., policies and procedures) aspects of the original charter application, no other material and non-material terms are defined as required by State Board Rule 0520-14-01-.06.
- iv. While the charter agreement is signed by the operator, it is not inclusive of the school's Governing Board and therefore does not demonstrate mutual understanding and acceptance of the terms by the authorizer and the independent Governing Board.
- v. While section 3.1 of the charter agreement makes evident the requirement of, and timeline for, an amendment to the agreement in the instance of a material change, no further documentation was provided to outline the purpose, process for submission, or approval process for an amendment petition.

Standard 3b - Rights and Responsibilities.						
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>	
i. Executes charter agreements that clearly: <ul style="list-style-type: none"> a. State the rights and responsibilities of the school and the authorizer; b. State and respect the autonomies to which schools are entitled—based on statute, waiver, or authorizer policy—including those relating to the school’s authority over educational programming, staffing, budgeting, and scheduling; c. Define performance standards, criteria, and conditions for renewal, intervention, revocation, and non-renewal, while establishing the consequences for meeting or not meeting standards or conditions; d. State the statutory, regulatory, and procedural terms and conditions for the school’s operation; e. State reasonable pre-opening requirements or conditions for new schools to ensure that they meet all health, safety, and other legal requirements prior to opening and are prepared to open smoothly; f. State the responsibility and commitment of the school to adhere to essential public-education obligations, including admitting and serving all eligible students as long as space is available, and not expelling or counseling out students except pursuant to a legal discipline policy approved by the authorizer; and g. State the responsibilities of the school and the authorizer in the event of school closures. 		X	X	X		
ii. Ensures that any fee-based services that the authorizer provides are set forth in a services agreement that respects charter school autonomy and treats the charter school equitably compared to district schools, if applicable; and ensures that purchasing such services is explicitly not a condition of charter approval, continuation, or renewal.				X		
0	1	2	3	4		
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>		
<ul style="list-style-type: none"> • Addresses none of the sub-standards, and • Satisfies none of the sub-standards 	<ul style="list-style-type: none"> • Addresses less than 50% of sub-standards and • Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> • Addresses 50 to 100% of the sub-standards, • Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> • Addresses 50 to 100% of the sub-standards • Satisfies 50 to 99.9% of the sub-standards 	<ul style="list-style-type: none"> • Addresses 100% of the sub-standards • Satisfies 100% of the sub-standards 		
<i>Rating</i>		0	1	2	3	4

			X		
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Evaluative Comments:

- i. While the executed charter agreement includes roles and responsibilities, general components of the school performance framework and grounds for revocation, compliance conditions for operation, obligations related to enrollment and discipline, and obligations of the school in the event of closure, the charter agreement does not contain information related to entitled autonomies, defining performance standards for renewal and intervention, including consequences for not meeting standards, pre-opening requirements, or responsibilities of the authorizer in the event of closure.
- ii. While section 3.3.1 of the charter agreement defines the requirement for a contract between the operator and the authorizer for any fee-based services provided, no further documentation was provided that demonstrated the contracted services would respect the charter school's autonomy and be separate from any conditions of approval or renewal.

P I L O T

Standard 3c – Performance Standards				
Sub-standards	<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>
i. Executes charter agreements that plainly: <ul style="list-style-type: none"> a. Establish the performance standards under which schools will be evaluated, using objective and verifiable measures of student achievement as the primary measure of school quality, in accordance with State law; b. Define clear, measurable, and attainable academic, financial, and organizational performance standards and targets that the school must meet as a condition of renewal, including, but not limited to, State and Federal measures; (See Paragraph ii., Performance standards detailed information.) c. Include expectations for appropriate access, education, support services, and outcomes for students with disabilities; d. Define the sources of academic data that will form the evidence base for ongoing and renewal evaluation, including State-mandated and other standardized assessments, student academic growth measures, internal assessments, qualitative reviews, and performance comparisons with other public schools in the district and State; e. Define the sources of financial data that will form the evidence base for ongoing and renewal evaluation, grounded in professional standards for sound financial operations and sustainability; f. Define the sources of organizational data that will form the evidence base for ongoing and renewal evaluation, focusing on fulfillment of legal obligations, fiduciary duties, and sound public stewardship; and g. Include clear, measurable performance standards to judge the effectiveness of alternative model schools, as defined by State law—requiring and appropriately weighting rigorous mission-specific performance measures and metrics that credibly demonstrate each school’s success in fulfilling its mission and serving its special population. 	X	X	X	
ii. Performance standards detailed information. Performance standards enable schools and authorizers to know the outcomes for which authorizers will hold schools accountable. They are the basis for school evaluation and should be incorporated in the charter agreement, commonly as an attachment. Academic, financial, and organizational performance standards should include clearly-defined and measurable indicators, measures, metrics, and targets that: <ul style="list-style-type: none"> a. Academic Performance <ul style="list-style-type: none"> 1. Set expectations for student academic achievement status or proficiency, including comparative proficiency; 	X	X	X	

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<ol style="list-style-type: none"> 2. Set expectations for student academic growth, including adequacy of growth toward State standards; 3. Incorporate State and Federal accountability systems, including State grading and/or rating systems; 4. Set expectations for postsecondary readiness, including graduation rates (for high schools); and 5. Provide schools an option to incorporate mission-specific performance measures for which the school has presented valid, reliable, and rigorous means of assessment approved by the authorizer. <p>b. Financial Performance</p> <ol style="list-style-type: none"> 1. Enable the authorizer to monitor and evaluate the school’s financial stability and viability based on short-term performance; and 2. Enable the authorizer to monitor and evaluate the school’s long-term financial sustainability. <p>c. Organizational Performance</p> <ol style="list-style-type: none"> 1. Define the essential elements of the educational program for which the authorizer will hold the school accountable; 2. Define financial management and oversight standards based on generally accepted accounting principles; 3. Hold school Governing Boards accountable for meeting statutory and Board-established operating and reporting requirements; 4. Ensure school compliance with student and employee rights and obligations; and 5. Establish expectations related to the school environment, including health and safety, transportation, facilities, and appropriate handling of records. 								
0	1	2	3	4				
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>				
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards				
• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards				
Rating			0	1	2	3	4	
					X			

Evaluative Comments:

- i. While the charter agreement defines the performance framework as including academic, finance, and compliance components, no further language or exhibits were included within the charter agreement that state the objective and measurable outcomes to be used to evaluate each of these components, as well as to determine the targets as a condition of renewal; outcomes for students with disabilities; sources for academic, financial and organizational performance data; or measures to judge the effectiveness of alternative school models (as applicable).
- ii. While the SPF highlights the general components of the academic, financial, and organizational performance standards, the authorizer's documentation does not clearly define the measurable indicators, measures, metrics, and targets for each component of the standards.

P I L O T

Standard 3d - Provisions for Educational Service Provider (ESP) Contracts (if applicable).							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i. Includes, for any school that contracts with an ESP provider for the management of its educational program, finances, or school operations, additional contractual provisions that ensure rigorous, independent contract oversight by the school Governing Board and the school's financial independence from the external provider.				N/A			
ii. Reviews the proposed ESP contract with the school Governing Board as a part of application review to ensure that it is consistent with applicable law, authorizer policy, and the public interest.				N/A			
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
<ul style="list-style-type: none"> Addresses none of the sub-standards, and Satisfies none of the sub-standards 	<ul style="list-style-type: none"> Addresses less than 50% of sub-standards and Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards, Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards Satisfies 50 to 99.9% of the sub-standards 	<ul style="list-style-type: none"> Addresses 100% of the sub-standards Satisfies 100% of the sub-standards 			
Rating			0	1	2	3	4
			N/A				
Evaluative Comments:							
i. N/A - As stated in the narrative and document debrief, operators must operate the schools themselves and may not employ an ESP. ii. N/A - As stated in the narrative and document debrief, operators must operate the schools themselves and may not employ an ESP.							

Standard 3e - ESP Contracts Additional Provisions (if applicable)		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>
Sub-standards					
i.	Clearly establish the primacy of the charter agreement over the ESP contract;			N/A	
ii.	Clearly identify the school Governing Board as the party ultimately responsible for the success or failure of the school, and clearly define the ESP as a vendor of services;			N/A	
iii.	Prohibit the third party from selecting, approving, employing, compensating, or serving as school Governing Board members;			N/A	
iv.	Provide for sufficient transparency around the spending of public monies; and			N/A	
v.	Require all instructional materials, furnishings, and equipment purchased or developed with public funds to be the property of the school, not the ESP, in compliance with State law.			N/A	
vi.	Contracts between the ESP and the school Governing Board should articulate: <ul style="list-style-type: none"> a. The roles and responsibilities of the school Governing Board and the service provider, including all services to be provided under the contract; b. The performance measures, consequences, and mechanisms by which the school Governing Board will hold the provider accountable for performance, aligned with the performance measures in the charter agreement; c. All compensation to be paid to the provider, including all fees, bonuses, and what such compensation includes or requires; d. Terms of any facility agreement that may be part of the relationship; e. Financial reporting requirements and provisions for the school Governing Board's financial oversight; f. All other financial terms of the contract, including disclosure and documentation of all loans or investments by the provider to the school, and provision for the disposition of assets in accordance with law; g. Assurances that the school Governing Board, at all times, maintains independent fiduciary oversight and authority over the school budget and ultimate responsibility for the school's performance; h. Provisions for contract termination; and i. Respective responsibilities of the Governing Board and service provider in the event of school closure, including transparency in the school's revenues and expenditures, as well as those managed by the ESP. 			N/A	
0	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	1	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	2	<i>Documentation:</i>
				3	<i>Documentation:</i>
				4	<i>Documentation:</i>

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• Addresses none of the sub-standards, <i>and</i>	• Addresses less than 50% of sub-standards <i>and</i>	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards			
• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards			
			0	1	2	3	4
			N/A				

Rating

N/A

Evaluative Comments:

- i. N/A - As stated in the narrative and document debrief, operators must operate the schools themselves and may not employ an ESP.
- ii. N/A - As stated in the narrative and document debrief, operators must operate the schools themselves and may not employ an ESP.
- iii. N/A - As stated in the narrative and document debrief, operators must operate the schools themselves and may not employ an ESP.
- iv. N/A - As stated in the narrative and document debrief, operators must operate the schools themselves and may not employ an ESP.
- v. N/A - As stated in the narrative and document debrief, operators must operate the schools themselves and may not employ an ESP.

DRAFT

Standard 4a - Performance Evaluation and Compliance Monitoring					
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>
i.	Implements a comprehensive performance accountability and compliance monitoring system that is defined by the charter agreement and provides the information necessary to make rigorous and standards-based renewal, revocation, and intervention decisions.	X	X	X	
ii.	Defines and communicates to schools the process, methods, and timing of gathering and reporting school performance and compliance data.	X	X	X	
iii.	Implements an accountability system that effectively streamlines Federal, State, and local performance expectations and compliance requirements while protecting schools' legally entitled autonomy and minimizing schools' administrative and reporting burdens.	X	X	X	
iv.	Provides clear technical guidance to schools as needed to ensure timely compliance with applicable rules and regulations.	X	X	X	X
v.	Visits each school as appropriate and necessary for collecting data that cannot be obtained otherwise and in accordance with the contract, while ensuring that the frequency, purposes, and methods of such visits respect school autonomy, minimize administrative burdens, and avoid operational interference.	X	X	X	
vi.	Evaluates each school annually on its performance and progress toward meeting the standards and targets stated in the charter agreement, including essential compliance requirements, and clearly communicates evaluation results to the school's Governing Board and leadership.				
vii.	Requires and reviews annual financial audits of schools, conducted by a qualified independent auditor.	X		X	
viii.	Communicates regularly with schools as needed, including both the school leaders and Governing Boards, and provides timely notice of contract violations or performance deficiencies.				
ix.	Provides an annual written report to each school, summarizing its performance and compliance to date and identifying areas of strength and areas needing improvement.				
x.	Articulates and enforces stated consequences for failing to meet performance expectations or compliance requirements.				
0	1	2	3	4	
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards	

• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards			
<i>Rating</i>			0	1	2	3	4
					X		

Evaluative Comments:

- i. While the SPF and executed charter agreement outline the general performance indicators for a school’s academic, operational, and financial outcomes and the guidebook details the authorizer’s process for sub-recipient monitoring, the documentation does not make evident how the authorizer implements its accountability system or how any data collected impacts the authorizer’s renewal, revocation, and/or intervention decisions.
- ii. While the guidebook defines and communicates the process and methods for the sub-recipient monitoring, the authorizer’s documentation does not communicate the timeline for monitoring beyond the beginning of the year, and no further documentation was provided regarding any other monitoring processes for gathering school performance or additional compliance data in alignment with the SPF.
- iii. While the SPF outlines the general components of the authorizer’s accountability system, the documentation does not make evident how the authorizer implements its accountability system or how its system protects schools’ autonomy and minimizes reporting burdens.
- iv. The guidebook, special education (SPED) and response to intervention professional development calendars demonstrate how the authorizer provides technical guidance to its schools in areas related to a host of compliance requirements (e.g., enrollment eligibility requirements, local wellness policy components).
- v. While the guidebook outlines that an on-site visit is conducted as part of the sub-recipient monitoring, the documentation does not make evident that the authorizer implements such visits or conducts any other annual site visit(s) to gather evidence for its performance framework.
- vi. No documentation was submitted to affirm annual evaluation against SPF standards nor communication of outcomes to the schools’ Governing Board and leadership.
- vii. While the charter agreement requires completion of an independent financial audit and a sample school audit was provided, no further evidence of reviewing financial audits was included.
- viii. The documentation does not make evident how the authorizer communicates regularly with its schools or provides timely notice of contract violations or performance deficiencies.
- ix. The documentation does not include evidence that the authorizer provides an annual written report to each school summarizing performance and compliance outcomes and identifying strengths or areas for improvement.
- x. The documentation does not demonstrate that the authorizer articulates and enforces stated consequences for failing to meet performance or compliance expectations.

Standard 4c - Protecting Student Rights					
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>
i.	Ensures that schools admit students through a random selection process that is open to all students, is publicly verifiable, and does not establish undue barriers to application (such as mandatory information meetings, mandated volunteer service, or parent contracts) that exclude students as provided by Federal, State, and local law.	X	X	X	
ii.	Ensures that schools provide equitable access and inclusive services to all students as required by applicable Federal and State law, including, but not limited to, students with disabilities, English learners, homeless students, students in foster care, migrant students, and gifted students.	X	X	X	
iii.	Ensures clarity in the roles and responsibilities of all parties involved in serving students with disabilities		X	X	
iv.	Ensures that schools' student discipline policies and actions are legal, fair, and equitable and that no student is suspended, expelled, or counseled out of a school outside of that process, and that schools have a clear process for addressing parent/ community grievances.	X	X	X	
0		3		4	
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>		<i>Documentation:</i>		<i>Documentation:</i>	
<ul style="list-style-type: none"> Addresses none of the sub-standards, and Satisfies none of the sub-standards 		<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards, Satisfies less than 50% of the sub-standards 		<ul style="list-style-type: none"> Addresses 100% of the sub-standards Satisfies 100% of the sub-standards 	
		0	1	2	3
				X	
Evaluative Comments:					

- i. While enrollment is an evaluative category of the SPF and expectations for enrollment are included within the family handbook, no additional documentation was provided that demonstrates how the authorizer ensures its schools follow these enrollment practices. Furthermore, while the authorizer described a process for monitoring enrollment onsite as part of Federal monitoring during the document debrief, no documentation to support this oversight was submitted.
- ii. While policy manuals (i.e., SPED, English learner, foster care, homeless, migrant) outline the policies, guidelines, and responsibilities for its charter schools around serving special populations, no additional documentation beyond the Individual Education Plan monitoring schedule demonstrates how the authorizer ensures its schools are meeting compliance requirements. Furthermore, while the authorizer described a process for monitoring access and inclusion compliance as part of Federal monitoring, no documentation to support this oversight was submitted.
- iii. While the SPED handbook includes instructional expectations for staff on pages 122-126 and the executed charter agreement defines the roles and responsibilities related to special education (section 3.6.2), the documentation does not define the authorizer's process to ensure that schools are meeting these expectations.
- iv. While compliant discipline policies, due process, and the establishment of a grievance process are requirements of the charter agreement, there is no additional documentation to demonstrate evaluation of implementation.

Standard 4d – School Intervention										
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>					
i.	Establishes and clearly communicates to schools at the outset an intervention and problem-solving policy that states the general conditions that may trigger intervention and the types of actions and consequences that may ensue.	X	X	X						
ii.	Gives schools clear, adequate, evidence-based, and timely notice of contract violations or performance deficiencies.	X		X						
iii.	Allows schools reasonable time and opportunity for remediation in non-emergency situations.									
iv.	Applies professional discretion when intervention is needed and considers context and a range of effective solutions.	X								
v.	Where intervention is needed, engages in intervention strategies that clearly preserve school autonomy and responsibility (identifying what the school must remedy without prescribing solutions) while clearly stating possible consequences for noncompliance.	X								
0		1		2		3		4		
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>		<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>		<i>Documentation:</i>		<i>Documentation:</i>		<i>Documentation:</i>		
<ul style="list-style-type: none"> Addresses none of the sub-standards, and 		<ul style="list-style-type: none"> Addresses less than 50% of sub-standards and 		<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards, 		<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards 		<ul style="list-style-type: none"> Addresses 100% of the sub-standards 		
<ul style="list-style-type: none"> Satisfies none of the sub-standards 		<ul style="list-style-type: none"> Satisfies less than 50% of the sub-standards 		<ul style="list-style-type: none"> Satisfies less than 50% of the sub-standards 		<ul style="list-style-type: none"> Satisfies 50 to 99.9% of the sub-standards 		<ul style="list-style-type: none"> Satisfies 100% of the sub-standards 		
						0	1	2	3	4
							X			
Evaluative Comments										
i. While the SPF includes action steps and timelines for communication to schools receiving a “does not meet” in student and family rights metrics, no additional documentation was provided regarding the conditions for the academic and financial domains that may trigger intervention.										
ii. While the SPF includes timelines for communication to schools receiving a “does not meet” in student and family rights metrics, neither the narrative nor documentation affirms whether intervention was needed during the review term.										
iii. The documentation does not make evident if the authorizer allows schools reasonable time and opportunity for remediation in non-emergency situations; no documentation was provided demonstrating how the authorizer engages in intervention.										
iv. The documentation provided does not allow for assessment of whether professional discretion is applied and whether a range of effective solutions is considered.										

v. Neither the narrative nor documentation affirms whether intervention was needed during the review term.

PILOT

Standard 4e – Public Reporting							
Sub-standards							
		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i. Produces an annual public report that provides clear, accurate performance data for the charter schools it oversees and reports on individual school and overall portfolio performance according to the framework set forth in the charter agreement in accordance with State law.							
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards			
• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards			
<i>Rating</i>			0	1	2	3	4
			X				
Evaluative Comments:							
i. The authorizer’s documentation does not include an annual public report with performance data for its charter schools set forth in its performance framework and charter agreement.							

Standard 5a - Revocation									
Sub-standards									
					<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>	
i. Revokes a charter during the charter term if there is clear evidence of extreme underperformance or violation of law or the public trust that imperils students or public funds, in accordance with State law.									
0	1	2	3	4					
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>					
<ul style="list-style-type: none"> Addresses none of the sub-standards, and 	<ul style="list-style-type: none"> Addresses less than 50% of sub-standards and 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards, 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards 	<ul style="list-style-type: none"> Addresses 100% of the sub-standards 					
<ul style="list-style-type: none"> Satisfies none of the sub-standards 	<ul style="list-style-type: none"> Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Satisfies 50 to 99.9% of the sub-standards 	<ul style="list-style-type: none"> Satisfies 100% of the sub-standards 					
					0	1	2	3	4
<i>Rating</i>					X				
Evaluative Comments:									
i. While the authorizer explained that, as of July 2020, the authorizer cannot remove any school from its portfolio earlier than the 2024-25 school year, the authorizer's documentation does not include a revocation policy outlining the triggers for extreme underperformance or violation of law or public trust in accordance with its charter agreements and state law that existed prior to July 2020. The authorizer should consider amendments to its charter agreements to reflect this significant change in law.									

Standard 5b - Renewal Decisions Based on Merit and Inclusive Evidence							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i.	Bases the renewal process and renewal decisions on thorough analyses of a comprehensive body of objective evidence defined by the performance framework in the charter agreement.	X	X				
ii.	Grants renewal only to schools that have achieved the standards and targets stated in the charter agreement, are organizationally and fiscally viable, and have been faithful to the terms of the contract and applicable law.	N/A					
iii.	Does not make renewal decisions on the basis of political or community pressure or solely on promises of future improvement.	N/A					
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
<ul style="list-style-type: none"> Addresses none of the sub-standards, and Satisfies none of the sub-standards 	<ul style="list-style-type: none"> Addresses less than 50% of sub-standards and Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards, Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards Satisfies 50 to 99.9% of the sub-standards 	<ul style="list-style-type: none"> Addresses 100% of the sub-standards Satisfies 100% of the sub-standards 			
Rating			0	1	2	3	4
				X			
Evaluative Comments:							
i. While the narrative explains that renewal decisions are based on the SPF, the narrative also states that renewals of a charter agreement have to run through the LEA as schools were not meant to remain in the ASD. Additionally, the authorizer stated that there is not a process in place for renewals though they have schools that are approaching the end of their charter term within the next two years. The documentation does not include an established renewal policy or process and does not make evident to its charter schools how the authorizer will determine its renewal decisions in accordance with its charter agreements. ii. N/A – The authorizer did not have any renewals during SY18-19 or SY19-20. iii. N/A – The authorizer did not have any renewals during SY18-19 or SY19-20.							

Standard 5c - Cumulative Report and Renewal Application						
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>	
i. Provides to each school, in advance of the renewal decision, a cumulative performance report that: <ul style="list-style-type: none"> a. Summarizes the school’s performance record over the charter term; and b. States the authorizer’s summative findings concerning the school’s performance and its prospects for renewal. 		N/A				
ii. Requires any school seeking renewal to apply for it through a renewal application, which provides the school a meaningful opportunity and reasonable time to respond to the cumulative report; to correct the record, if needed; and to present additional evidence regarding its performance.		X				
0	1	2	3	4		
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>		
<ul style="list-style-type: none"> • Addresses none of the sub-standards, and • Satisfies none of the sub-standards 	<ul style="list-style-type: none"> • Addresses less than 50% of sub-standards and • Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> • Addresses 50 to 100% of the sub-standards, • Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> • Addresses 50 to 100% of the sub-standards • Satisfies 50 to 99.9% of the sub-standards 	<ul style="list-style-type: none"> • Addresses 100% of the sub-standards • Satisfies 100% of the sub-standards 		
Rating		0	1	2	3	4
			X			
Evaluative Comments:						
i. N/A - The authorizer did not have any renewals during SY18-19 or SY19-20. ii. While the authorizer has not had any renewals during SY18-19 or SY19-20 and acknowledged in the document debrief that they are working on creating this process with the TN Department of Education, no draft documentation was provided for review.						

Standard 5d - Fair, Transparent Process.							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
i.	Clearly communicates to schools the criteria for charter revocation, renewal, and non-renewal decisions that are consistent with the charter agreement, including any policy changes thereto.						
ii.	Promptly notifies each school of its renewal (or, if applicable, revocation) decision, including written explanation of the reasons for the decision.	N/A					
iii.	Promptly communicates renewal or revocation decisions to the school community and public within a timeframe that allows parents and students to exercise choices for the upcoming school year.	N/A					
iv.	Explains in writing any available rights of legal or administrative appeal through which a school may challenge the authorizer's decision, including appeal to the State Board of Education.	N/A					
v.	Regularly updates and publishes the process for renewal decision making, including guidance regarding required content and format for renewal applications.	X					
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
<ul style="list-style-type: none"> Addresses none of the sub-standards, and Satisfies none of the sub-standards 	<ul style="list-style-type: none"> Addresses less than 50% of sub-standards and Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards, Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards Satisfies 50 to 99.9% of the sub-standards 	<ul style="list-style-type: none"> Addresses 100% of the sub-standards Satisfies 100% of the sub-standards 			
Rating			0	1	2	3	4
				X			
Evaluative Comments:							

- i. The documentation does not include any policies or specific criteria for how it will evaluate and inform any revocation, renewal, and non-renewal decisions.
- ii. N/A – The authorizer did not have any schools facing renewal during SY18-19 or SY19-20.
- iii. N/A – The authorizer did not have any schools facing renewal during SY18-19 or SY19-20.
- iv. N/A – The authorizer did not have any schools facing renewal during SY18-19 or SY19-20.
- v. While the authorizer explained that it is currently developing a renewal process in collaboration with the Tennessee Department of Education (TDOE), no draft documentation was provided for review.

Standard 5e - Closure						
Sub-standards						
		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>	
i. In the event of a school closure, oversees and works with the school Governing Board and leadership in carrying out a detailed closure protocol that ensures timely notification to parents; orderly transition of students and student records to new schools; and disposition of school funds, property, and assets in accordance with law.		X	X	X		
0	1	2	3	4		
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>		
• Addresses none of the sub-standards, and	• Addresses less than 50% of sub-standards and	• Addresses 50 to 100% of the sub-standards,	• Addresses 50 to 100% of the sub-standards	• Addresses 100% of the sub-standards		
• Satisfies none of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies less than 50% of the sub-standards	• Satisfies 50 to 99.9% of the sub-standards	• Satisfies 100% of the sub-standards		
		0	1	2	3	4
<i>Rating</i>				X		
Evaluative Comments:						
i. While the submitted TDOE charter school closure guidance document contains recommendations for closure actions and recommended owners related to immediate action items, notification action items, records action items, and financial action items, the closure documentation provided did not make evident the authorizer’s implementation of the TDOE’s guidance document or the transition of records and disposition of funds, property, and assets during a recent closure.						

Charter School Authorizer Evaluation Report: 2020 Pilot
Authorizer: Achievement School District

Standard 6a - Advanced Standards (Extra Credit)							
Sub-standards		<i>School Leader Interview and/or Document Debrief</i>	<i>Narrative</i>	<i>Documentation addresses</i>	<i>Documentation Fully Satisfies</i>		
a. Ensures authorizing is visible, adequately resourced, and the people responsible for day-to-day authorizing functions have input over decision making.		X		X			
b. Presents and implements an intentional strategic vision and plan for chartering, including clear priorities, goals, and timeframes for achievement.		X		X			
c. Evaluates its work regularly against its chartering mission and strategic plan goals and implements plans for improvement when falling short of its mission and strategic plan.							
d. Provides an annual public report on the authorizer's program and performance in meeting its strategic plan goals.							
e. Broadly invites and solicits charter applications while publicizing the authorizer's strategic vision and chartering priorities, without restricting or refusing to review applications that propose to fulfill other goals.			X				
0	1	2	3	4			
<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>School Leader Interview, Document Debrief, Narrative and/or Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>	<i>Documentation:</i>			
<ul style="list-style-type: none"> Addresses none of the sub-standards, and Satisfies none of the sub-standards 	<ul style="list-style-type: none"> Addresses less than 50% of sub-standards and Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards, Satisfies less than 50% of the sub-standards 	<ul style="list-style-type: none"> Addresses 50 to 100% of the sub-standards Satisfies 50 to 99.9% of the sub-standards 	<ul style="list-style-type: none"> Addresses 100% of the sub-standards Satisfies 100% of the sub-standards 			
			0	1	2	3	4
<i>Rating</i>				X			
Evaluative Comments:							
<p>a. While there is evidence that the authorizing staff is adequately resourced, based on a team of 15 for a portfolio of 29 schools, there is no further documentation related to visibility or input over decision making.</p> <p>b. Outside of a stated goal to move the bottom 5% of school to the top 25% within five years, no further documentation related to chartering priorities, goals, and timeframes for achievement was submitted.</p> <p>c. No documentation related to evaluating its work against its chartering mission and goals was submitted.</p> <p>d. No annual public report was submitted with the documentation.</p> <p>e. While the authorization overview demonstrates the cultivation of a portfolio of national and local operators and the RFP communicates a vision for dramatically improving Priority Schools, no application process has been launched since 2016.</p>							