



Navigating the Charter School Application

Session 2



The Team

Brittany Glenn

New Schools Manager

John Garland

New Schools Coordinator

Sarah Khan

New Schools Coordinator

Session 2, June 7th

Time (CST)	Topic	Presenters
1:00-1:05	Welcome, Purpose, and Norms (5min)	New Schools Team, Division of Authorizing
1:05-1:20	Charter Overview and Timeline (15min)	New Schools Team, Division of Authorizing
1:20-1:35	Charter School Funding (10min) + Q&A (5min)	New Schools Team, Division of Authorizing
1:35-1:50	Components of the Financial Plan (10min) + Q&A (5min)	New Schools Team, Division of Authorizing
1:50-2:25	Charter School Operations and Facilities (25min) + Q&A (10min)	Laurie McIntyre, Division of Authorizing
2:30-2:55	The Superintendent Role (20min) + Q&A (5min)	Jennifer Goodman, The Odyssey Academy
2:55-3:00	Session Recap (5min)	New Schools Team, Division of Authorizing
3:00-3:10	Optional Q&A	New Schools Team, Division of Authorizing

Session 1

Discuss timely topics for the **Subchapter D and E application processes** that include:

The **Role of Open-Enrollment Charter Schools** in Texas

High-Level Overview of **Current Portfolio**

Timeline and Milestones

Eligibility Requirements

The **Application Structure**

The Importance of **Creating a Solid Applicant Team**

Charter School **Governance and Board Selection**

Communicating the **Mission and Vision**

Session 2

Discuss timely topics for the **Subchapter D and E application processes** that include:

The **Role of Open-Enrollment Charter Schools** in Texas

High-Level Overview of **Current Portfolio**

Timeline and Milestones

Charter School **Funding**

Components of the **Financial Plan**

Aspects of Charter School **Operations and Facilities**

The **Superintendent Role**



Looking Ahead

Application Launch

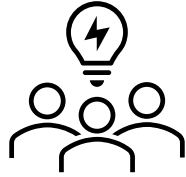
Generation 30 will launch in July, and we will hold the required Information Sessions. We will go over the following.

The Application **Requirements**

The Application **Timeline**

The Application **Review Process**

Open-Enrollment Charters in Texas

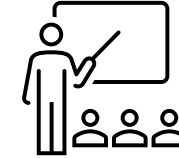


What is **Open-Enrollment**?

A school that is **open to all students on a first-come/first-serve basis**, regardless of the school model.

Schools **may consider whether a student has documented history of** a criminal offense, a juvenile court adjudication, or discipline problems under Subchapter A, Chapter 37.

Schools **specializing in performing arts** may consider whether the student demonstrates artistic ability.



What is an **LEA**?

Texas authorizes **Local Education Agencies** (LEAs).

Charter schools are their own LEA, which **means they have a governing board that is legally responsible for the administration, performance, and governance** of all campuses under the LEA.

An entity **may not hold multiple charter LEAs**.

The Purpose of Texas Charter Schools



Improve student learning



Increase choice opportunities in the public-school system



Create professional opportunities to attract new teachers



Establish a new form of accountability



Encourage different and innovative learning methods

SY 22-23 Charter School Enrollment



**Charter School
LEA's**

186



Student Enrollment

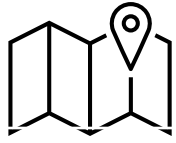
422,930



**Charter School
Campuses**

916

Operator Size



14 **Large Operators**

(10+ Campuses)



21 **Medium Operators**

(6-9 Campuses)



78 **Small Operators**

(2-5 Campuses)



73 **Standalone Operators**

(Single Campus)

471
Campuses

244,714
Students

145
Campuses

71,457
Students

227
Campuses

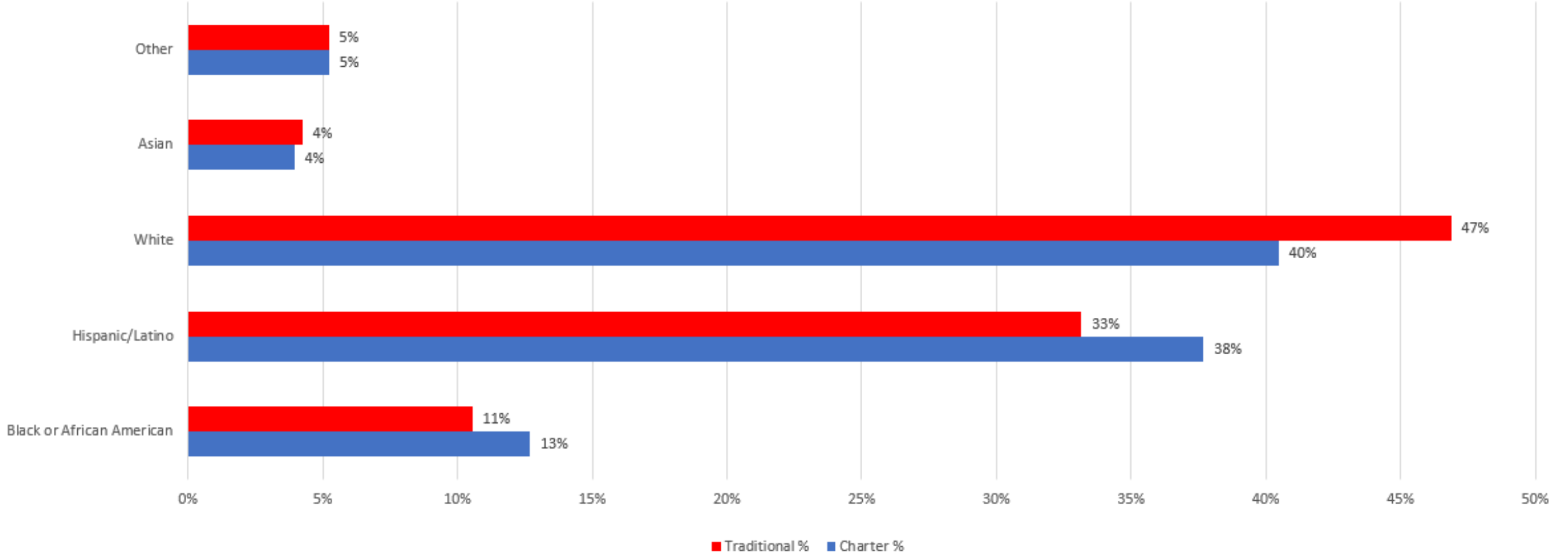
80,470
Students

73
Campuses

26,289
Students

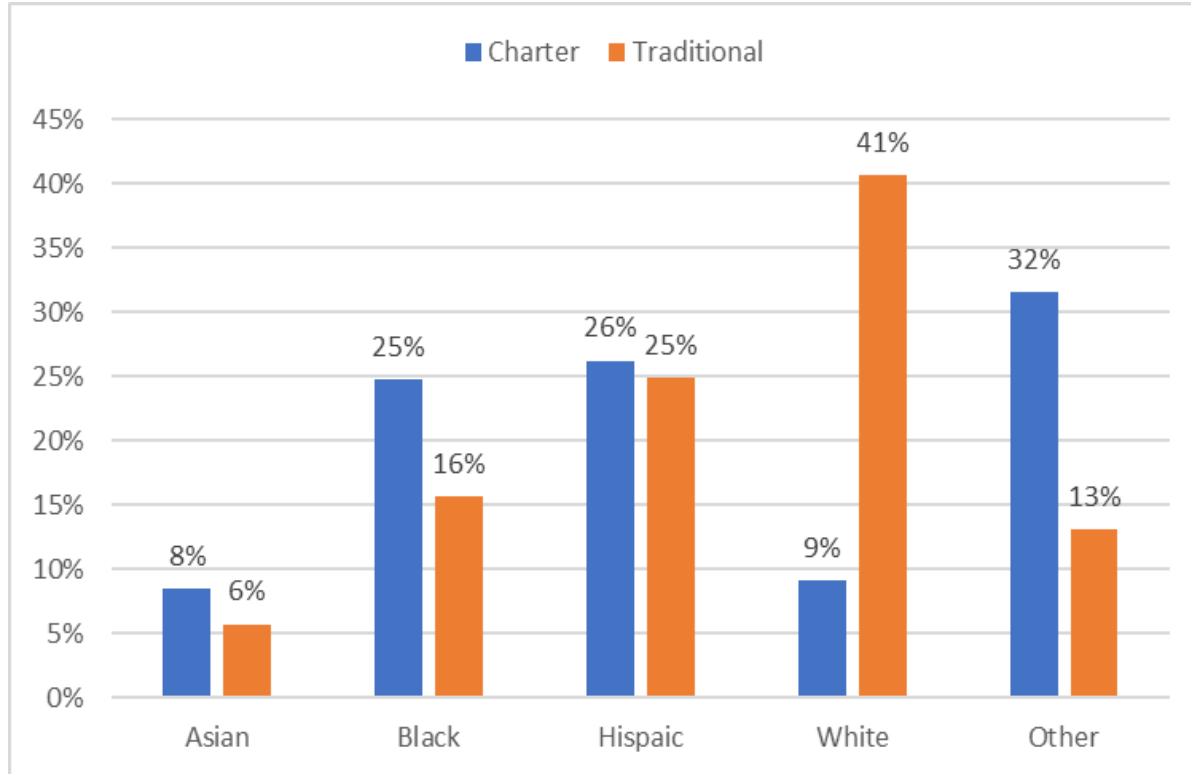
The Majority of Charter Schools Manage Fewer Than 6 Campuses.



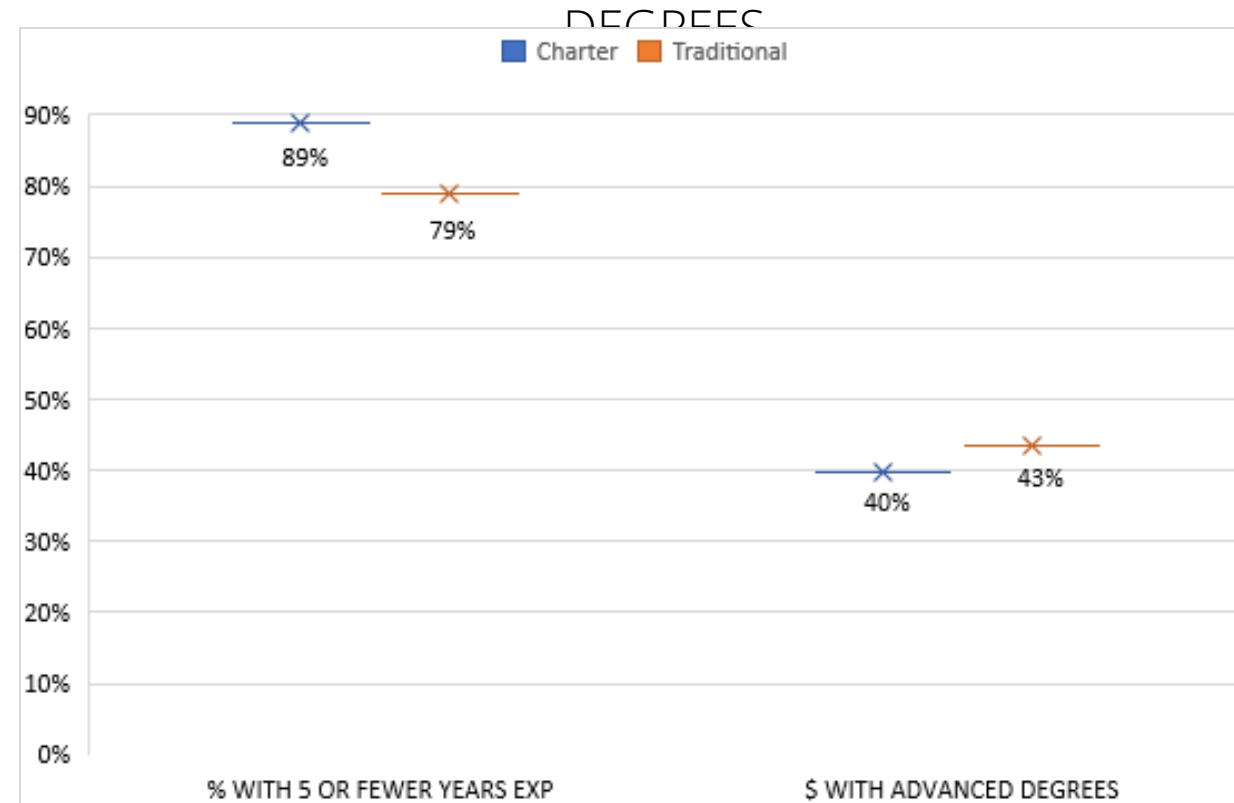


Charter schools enroll 2% more Black and 5% more Hispanic students than traditional schools.

STAFF ETHNICITIES



EXPERIENCE & ADVANCED DEGREES



Charter schools employ a higher percentage of non-white teachers than traditional districts.

Since 2013, 13.4% of Charter Applicants Have Been Approved



The 20 largest authorizers in the US approve approximately 39% of their new charter applications.

Authorizing Timeline

Authorization Timeline

APPLICATION LAUNCH

July & August

**INFORMATION
SESSIONS (x2)**

DRAFTING PERIOD

**August -
October**

**APPLICATION
SUBMISSION**

COMPLETION REVIEW

**December -
April**

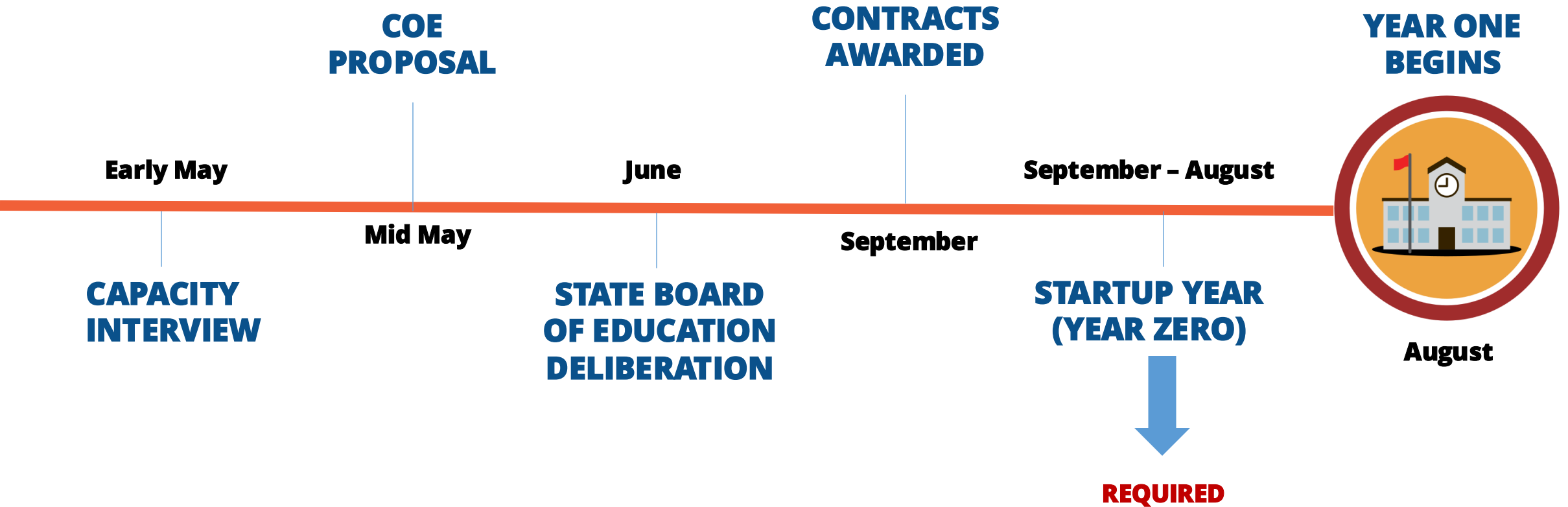
**EXTERNAL
REVIEW**

February - April

July

Early November

Authorization Timeline



Charter School Funding



State Funds

- **State funds constitute the bulk** of a charter school's revenue.
- Public schools in Texas receive state funds based on the **Average Daily Attendance** (ADA) of students.
- The [Foundation School Program \(FSP\)](#) is the source for ADA funds. It is broken down by [Tier One](#), [Tier Two](#), and ["Other Program"](#) allotments.



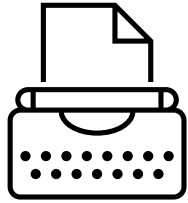
Grant Funds

- Applicants may budget for up to \$900,000 in Federal [Charter School Program \(CSP\)](#) Start-Up Grant funds.
- Charter schools may apply for **both TEA and external** grant opportunities.
- The Texas Education Agency posts [all grant opportunities](#).



Philanthropic Funds

- **Charter schools may utilize fundraising** and other alternative philanthropic activities.
- Charter may accept philanthropic funds from **both public and private sources**.
- All **donations must be voluntary** and not subject or conditional upon enrollment.



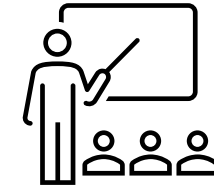
Application Drafting Phase

- Applicants **do not receive state or federal funding** during the drafting phase.
- Applicant should begin:
 - exploring and applying for grant awards; and
 - preliminary conversations with philanthropic donors



Start-Up Year (Year 0)

- Newly authorized charter schools **do not receive Foundation School Program (FSP) funds** until students are served in Year 1.
- Newly Authorized charter schools **may receive and/or utilize:**
 - CSP Start-Up funds;
 - Grant funds;
 - Philanthropic funds; and/or
 - Lines of credit

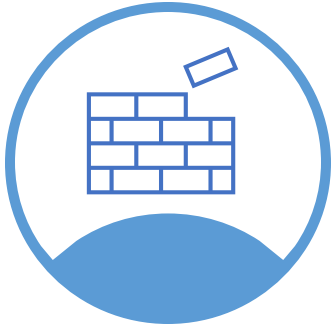


Year 1 and Beyond

- Charter schools are **prohibited from charging tuition and/or other fees.**
- Charter schools:
 - start **to receive state aid allotments** in Year 1;
 - have some **CSP implementation funds** to spend in Year 1;
 - receive federal funds (if applicable); and
 - continue to utilize any other local funds

The Financial Plan

The Financial Plan Components



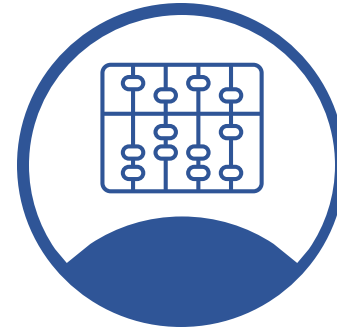
Start-Up Plan Year 0

- Details a comprehensive plan **from post-approval to opening**
- Specifies tasks, timelines, and individuals responsible for each task



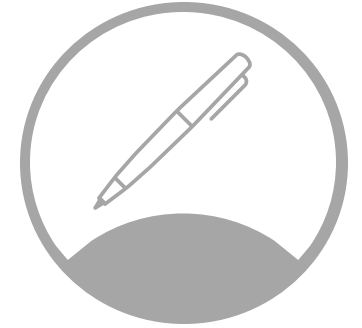
Budget Narrative

- **Supports the assumptions and projections** presented in the Financial Plan Workbook
- **Provides a clear contingency plan** in the event of revenue shortfalls



Financial Plan Workbook

- Establishes a detailed budget across a variety of domains



Evidence of Financial Support

- Identifies **dollar amounts, property, and/or other sources** that will be available upon award
- Provides an opportunity to **include letters of intent, commitment, MOU's, and/or contract agreements**

The Financial Workbook

Purpose

The Purpose

The Financial Workbook is a **critical tool designed to ensure charter schools' financial viability** and sustainability.

A **strong financial workbook will...**



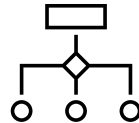
Demonstrate Financial Readiness

Show an ability to manage and utilize funds effectively.



Ensure Compliance

Meet TEA's financial guidelines and regulatory requirements.



Demonstrate Structured Planning

Develop a clear, organized, viable budget to guide the school's financial decisions.



Secure Longevity

Outline a plan for the proposed charter's long-term financial health and sustainability.

The Financial Workbook

Important Concepts

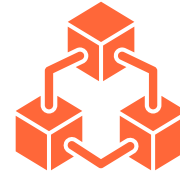


Enrollment and Attendance Projections

Applicants must provide **enrollment projections for both general and specific student populations** (SPED, CTE, Dyslexia, Gifted Talented, etc.) in the workbook.

The **workbook will then calculate state aid estimates** based on your projected enrollment and attendance.

The **workbook is a valuable tool** to understand the impact of enrollment and attendance on financial viability.



Personnel Structures

Applicants must identify **all personnel, number of positions, and associated salaries** in the workbook.

Applicants must also **itemize payroll taxes, benefits, and any contracted services**.



Operational Expense Planning

Applicants must project **specific operational expenses** (Supplies, Textbooks, Equipment, Rent, Student Testing, Utilities, etc.) in the workbook.

Applicants must **also account for expense growth** (year over year).

The Financial Plan

Actionable Items Prior to Application Launch

1

Download the [Generation 29 Financial Workbook](#) and assess your team's level of comfort with building out an operational budget.

2

Review the [Generation 29 Financial Plan and Workbook Presentations](#) (1 hr 50min mark) to see a robust walkthrough from TEA finance staff.

3

Download the [Generation 29 Charter School Program \(CSP\) Start-Up Grant Presentation Materials](#) and develop a familiarity with allowable vs unallowable costs.

4

Review the [Generation 29 Charter School Program \(CSP\) Start-Up Grant Presentation](#) to hear a robust explanation of the presentation materials.

Review the [Generation 29 Capacity Interviews](#) to hear common questions regarding applicant financial plans.

5

Familiarize yourself **with state funding structures and allotments.**

6

Start recruiting team members or service providers who can fill in financial knowledge gaps and/or skillsets.

7

Start conversations with potential funders, community partners, and organizations.

8

Charter School Operations and Facilities

Presentation by Laurie McIntrye

- AskTED
 - All-In-One Form
 - Personnel Updates
 - Campus Updates
- Amendments
 - Types of Amendments
 - Relocation of Facilities Non-Expansion Example
- Certificates of Occupancy
 - Listed Address Requirement
 - "E" Rating (Educational Use)
- Charter Coordinators

AskTED (Texas Education Directory)

- All-In-One Form

- All updates made in AskTED are required to go through the charter division via the all-in-one form
- The form is online and guides you through the submission as you fill out the information
- Your portfolio coordinator will complete the requested updates and email acknowledgment

- **Personnel Updates**

- District-level personnel are listed in AskTED
- Only the positions on the all-in-one form can be listed in AskTED and should be updated regularly
- Charters are welcome to list more positions locally

- **Campus Updates**

- Campus personnel updates in AskTED are limited to campus principals

- District Information Updates

- Changes to phone number, email, website and shipping address can be completed via [all-in-one](#)
- Changes to charter name, physical address or mailing address require a [non-expansion](#) amendment and signed board resolution

- Campus Information Updates

- Changes to phone number, public email or website can be completed via [all-in-one](#)
- Changes to campus name, physical address or mailing address require a [non-expansion](#) amendment and signed board resolution

Expansion

An expansion amendment is required if your charter requests to grow.

Types:

- New campus/site
- Increase maximum enrollment
- Additional grade levels to charter



PK, K, 1, 2, 3, 5, 6, 7, 8...

Non-Expansion

A non-expansion amendment is needed if your charter will change but not grow.

Examples:

- Postponing the opening of a campus or site
- Relocation of a campus or site

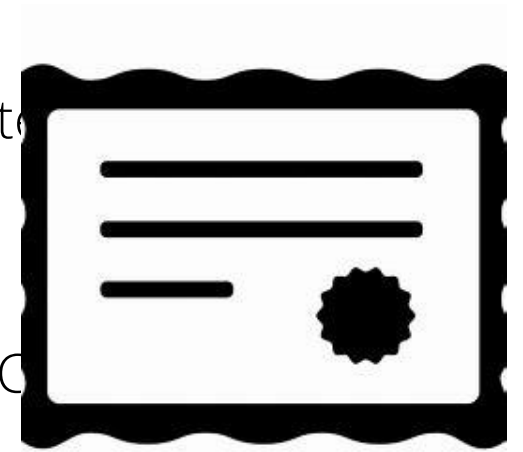


Certificate of Occupancy COO

- ✓ REQUIRED for opening a campus or site and filed before serving students
- ✓ Address must match location address for campus or site
- ✓ Required to list an "E" rating/group/code for Educational Use on the certificate

Temporary Certificate of Occupancy TCO

- ✓ Allowed as a temporary substitute for a permanent certificate of occupancy COO
- ✓ Must have an expiration date listed – normally 30-90 days after issue
- ✓ Address must match location address for campus or site
- ✓ Must have an "E" rating for Educational Use



Submit as a PDF attachment via the All-In-One form, directly as an email attachment to your portfolio coordinator or to charteramendments@tea.Texas.gov

Portfolio Coordinators



Jeff Koch
**A-D and M-So
Charter Schools**
Texas College
Preparatory Academies,
Premier HS



Mercedes Coleman
E-L Charter Schools
KIPP Texas Public
Schools, BASIS Texas,
Harmony Public Schools



Laurie McIntyre
Sp-Z Charter Schools
Great Hearts Texas, ILT,
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TEA Charter Portfolio Contacts

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***You can also email our general mailboxes
at:***

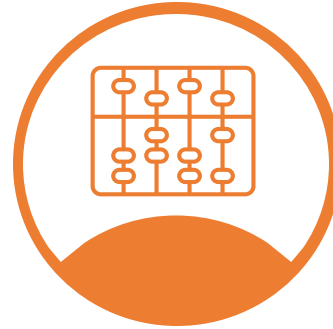
charteramendments@tea.Texas.gov

charteraskted@tea.Texas.gov



Charter School Funding

- ✓ Do you know where to find grants opportunities?
- ✓ Who will oversee writing the grants?
Do you understand the rules regarding tuition and fees for students?
- ✓ Have you sourced any donations?
If not, where can you begin looking?



Financial Workbook

- ✓ Familiarize yourself with the Generation 29 Financial Plan Workbook.
- ✓ Determine your enrollment minimum and maximum.
- ✓ Ensure that you can provide detailed notes for each assumption.



Superintendent Role

- ✓ Essential characteristics and attributes
- ✓ Skills and competencies
- ✓ Critical tasks and knowledge base
- ✓ Prior professional experiences

Bonus Resource from Session 1

Community Engagement Self Assessment

Asking Important Questions

Some important questions when engaging community stakeholders.

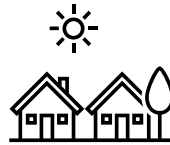
Review the Community Engagement Resource to organize your thoughts and approach. It will be sent by email.

Reflect on topics that include, but not limited to...



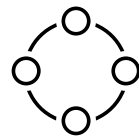
Communication Strategies

What communication methods will be most effective?



Needs of the Community

How are you assessing need and identifying gaps?



Building Representation

How will your proposal represent community need and fill in those gaps?



Identifying Key Actors

What collaborations, partnerships, stakeholders, and institutions are necessary to help facilitate the mission?

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John Garland
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Break Time!

We will return at 2:35 p.m