

CCSA
California
Charter Schools
Association

CALIFORNIA'S
CHARTER SCHOOLS
1992 to 2012
20 YEARS REINVENTING
PUBLIC EDUCATION

Fall Regional Charter Leaders Meeting: Los Angeles

*Many thanks to our host, the Celerity
Educational Group!*

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EdTec

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COMPANY	SERVICES	CLIENTS & PARTNERS
<ul style="list-style-type: none"> • Social venture committed to the development, support, and advancement of quality charter schools • Leading provider of professional consulting and business back-office services to charter schools • Founded in 2001, EdTec has 10 years of demonstrated success in serving charter developers, independent charter schools, and multi-site CMOs • Expertise ranges from charter launch and operation to school performance and school software solutions • EdTec has provided services exclusively to charter schools since its inception • Offices in Los Angeles, SF Bay Area, and Nashville • Staff of 40 professionals, operations, compliance, data, and software solution specialists 	<p>School Operations</p> <ul style="list-style-type: none"> • Budgets and Financials • Accounting, AP, and Payroll • Reporting and Compliance • Audit Support • Board Support • Facilities Planning <p>Governance</p> <ul style="list-style-type: none"> • Board Training & Development • Strategic Planning <p>Charter Development</p> <ul style="list-style-type: none"> • Petition Development • Renewal Assistance • School Launch <p>School Performance</p> <ul style="list-style-type: none"> • Student Data Analysis <p>School Software Solutions</p> <ul style="list-style-type: none"> • PowerSchool • DataDirector • EdTec School Portal 	<p>Clients</p> <ul style="list-style-type: none"> • 250+ Charter Schools and Support Organizations since 2001 • Start-ups and Established Schools • Single-site and CMOs • Rural to Urban Schools • Simple to Complex Finances <p>Selected Projects</p> <ul style="list-style-type: none"> • Business Plan – Charter School Growth Fund (KIPP LA) • DataDirector Support (Celerity Schools) • Market Analysis (Environmental Charter Schools) <p>edtec Business and Development Specialists for Charter Schools</p>

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EdTec: Meet the Team

Adam Miller
Annice Weinstein
Bryce Fleming
Dorothy Lee
Jennie Bartkowiak
Kelly Theofanis
Mark Campo
Peter Laub

Financial Management Strategic Planning Data Analysis Software Support

edtec
Business and Development Specialists for Charter Schools

For More Information
Mark Campo- mark@edtec.com

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Staples Advantage Overview

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The diagram shows the Staples Advantage business structure. At the top is the Staples logo. Below it are three main branches: North American Delivery, North American Superstores, and Staples International. North American Delivery is further divided into Staples Advantage, Staples Business Delivery, and Quill Corporation. Staples Advantage is further divided into Staples Business Advantage and Staples Enterprise Accounts. Below these branches is a red bar labeled 'Staples Lines of Business' which includes Office Supplies, Facility Solutions, Technology Solutions, Print Solutions, Promotional Products, and Business Interiors.

"People know us for our stores, but our world-class delivery business is now larger than our retail operation."

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Program Benefits

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- Pre-Negotiated Savings**
 - Office Products
 - Largest furniture retailer in North America
 - Facilities & Breakroom
- Dedicated Account Management**
 - One contact that knows your needs
 - K-12 expertise
 - Dedicated customer service team
- Easy Ordering & Shipping**
 - Free next-day delivery
 - Online ordering through Order.StaplesAdvantage.com
 - Hassle-free returns

To get started visit: www.staplesadvantage.com/californiacharter

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Meeting Agenda

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- I. Announcements
- II. Statewide Updates
 - A. From the Capitol
 - B. Changing the "U"
 - C. Facilities
 - D. C.I.V.I.C.S.
 - E. CCSA Advocates
- III. Renewals
- IV. LAUSD Zimmer Resolution

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20th Annual Charter Schools Conference & Anniversary Celebration

March 11-14, 2013: San Diego Convention Center

KEY DATES:

- Call for Presentations: October 5
- Super Early Bird Registration: October 26
- Hart Vision Nominations: Early Oct (TBD)

NEW EVENT!

20th Anniversary Awards Dinner!
Tuesday, March 12, 2013 5PM-7PM
Tickets are \$20 PP or \$180 per table. On Sale NOW!

For More Information: www.charterconference.org

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Charter Advantage

- CCSA is expanding our group purchasing program, Charter Advantage, in an attempt to save you time and money
- By leveraging the purchasing power of our membership, CCSA will negotiate discounts with corporate partners for charter-specific products and services
- Since 2009, CCSA group purchasing has saved participating members over \$2 million

Featured Partner (Office/Classroom Supplies) -

STAPLES Advantage

- Special CCSA discount pricing
- Free next-day delivery
- Easy online ordering process
- Dedicated account manager – Tom Croley (415-273-5032)

For more info visit www.calcharters.org/charteradvantage

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Charter Safe

CCSA's JPA Insurance Program

➔

Charter Safe
www.chartersafe.com

Still offering the same great services...
See: www.chartersafe.com for more information

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CCSA Data Collection

Two collection efforts underway:

1. Fall Data Campaign
2. Charter School Facilities Initiative

*Fueled with this invaluable information, CCSA is better equipped to educate the public, enact change in Sacramento, and make advancements in areas of import to the charter school movement like **funding, facilities and special education.***

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Update From the Capitol:

1. Looking Back on 2012
2. Looking Forward to 2013
3. Things You Can Do!

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Looking Back on 2012

- Despite another difficult budget year, we managed to **defeat** attempts to cut charter school funding, in no small part due to the thousands of emails and dozens of phone calls made by you
- The final budget included many wins for charter schools:
 - SB 740 Facility Grant Program fully funded
 - New Mandate Block Grant provides charter schools with \$14 per ADA
 - Can now seek a deferral waiver without authorizer approval
 - Improved process for charter schools to access loans, and new cash flow relief options
 - A number of surplus property provisions now give charter schools first right of refusal to district surplus property during the 2012-13 fiscal year

Get up to date budget information and details at calcharters.org/budgetupdate



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Looking Back on 2012



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- Several charter school bills went to the Governor for action by September 30
 - CCSA opposed AB 1594 & AB 1811 (**vetoed**)
 - CCSA supported SB 1028 (**signed**), SB 1290 (**signed**), and AB 1919 (**vetoed**)

View the text of all bills and more information at calcharters.org/capitol
- The SBE continues to be relatively strong for charter schools
- Accurate data reporting is key



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Looking Forward to 2013



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Goals for 2013

1. Growing New Schools
2. Securing Equitable Funding
3. Securing Equitable Facilities
4. Protecting Charter School Autonomy & Flexibility
5. Increasing Public Awareness & Collective Action
6. Ensuring Accountability



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Things You Can Do!



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1. Stay up-to-date on charter school issues via the *Capitol Update*
2. Look for ways to engage your newly-elected Legislators on future issues, such as writing congratulatory letters and inviting them to visit your school
3. Your voice will be needed again soon: the Governor's budget will be introduced in January, and legislative proposals will start being introduced as early as December



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Changing the "U"



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1. Three Key Strategies
2. Closing Underperforming Schools
3. Public Call for Non-Renewal
4. Defining High Impact : Progress
5. Supporting Struggling Schools



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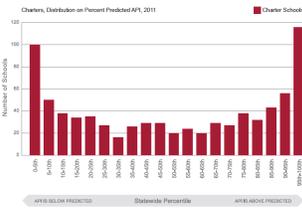
Three Key Strategies



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1. Ensuring the closure of underperforming schools
2. Supporting the strategic growth of high-performing schools and accelerating their replication
3. Supporting struggling schools through early identification and support

Charters, Distribution on Percent Predicted API, 2011





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Closing Underperforming Schools: Public Call for Non-Renewal



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2011-12

- Initiated implementation of our accountability framework
- Identified and called for closure of the ten schools in renewal that did not meet CCSA Accountability Standards.

Results:

- Four closed
- Three were given only one-year extensions with clear benchmarks
- Three were renewed without conditions




Public Call for Non- Renewal:
Remains the Same for 2012-13

- Nov 15***
 - Accountability Report Cards Issued to all schools
- 4 weeks**
 - Period for schools to correct data or submit additional individual student level analysis for schools below first set of criteria
- Jan 18**
 - List of all schools missing minimum *CCSA Renewal* criteria, after adjustments, goes public
 - Advocacy for closure of schools below criteria
- Before Conference**
 - Portrait of the Movement 2013 published with full results of all California charters

*pending CDE Data Release date




Defining High Impact : Progress

Progress Thus Far
As a result of member feedback and pending legislation, we have a few recommended additional measures for this next iteration of the high impact definition:

- Publically available college readiness indicators:
 - UC/CSU a-g course completion rates
 - EAP participation & proficiency rates
 - Cohort graduation rates
- Achievement gap closing rate




Proposed Definition 1.5- High Impact

PARAMETERS	FLEXIBILITIES
Not ASAM Not Below on SSM >= 3 Years Old API >= 800 ELA/Math >= 50% Proficient and Above High School Cohort Graduation Rate >= 80%	<u>Elementary and Middle Schools:</u> Above on SSM OR Closing the Achievement Gap >= 5% with All Underserved Subgroups <u>High Schools:</u> Above on SSM OR Closing Achievement Gap >= 5% OR College Readiness (A-G Completion Rate >= 75% OR EAP 80% participation/25% ready in English and Math)




Supporting Struggling Schools: Additional Supports Coming Soon (Spring)

- New web-enabled dashboards to help schools connect with high performing charters *that match demographics, special populations served* and other important comparisons
- Additional supports to refer to targeted assistance, and self-diagnostics to assess areas of relative strengths and weaknesses




Facilities:

- Prop 39
- Surplus Property




Prop 39 Season is Here!

Prop. 39 Requests for Facilities are Due Nov. 1!

CCSA is ready to help you with these resources:

- Web support with info, templates and on-demand training sessions: <http://www.calcharters.org/2010/09/proposition-39-resources-and-templates.html>
- Check your *Weekly Member Digests* for Prop. 39 "Office Hours" sessions with MYM and CCSA legal experts.
- Take advantage of FREE legal review of your Prop. 39 request – send to Anne Lee at alee@calcharters.org by 10/19.
- Submit your request for Prop. 39 facilities to your district by November 1.
- Contact Anne Lee with questions!




Surplus Property Access

- The 2012 Education Trailer Bill provides an opportunity for charter schools to lease or purchase a school district's surplus property
- Any property deemed "Surplus" by a district between July 1, 2012-June 30, 2013, must *first* be offered to any "interested" charter school prior to being offered to any other entity
- Property must be offered to the charter for not less than a five-year period
- Property may be sold at "less than fair market value" to charters




Act Now!

- You must make a formal written request to the district, in order to be considered for sale or lease of surplus property.
- CCSA has drafted a template letter to assist you in this process
<http://www.calcharters.org/2012/08/surplus-property-template-letter.html>
- CCSA is working to extend the timeframe on this law, but we need your help through participation in this opportunity.
- Send your letter of interest today. It's easy and important.
- Let us know!



California Charter Schools Association
ADVOCATES

What is CCSA Advocates?

- CCSA Advocates is a 501(c)(4) "social welfare" organization
 - More flexible than a (c)(3) in its activities
- Its activities include:
 - **Lobbying**
 - Federal and state lobbying activity for CCSA
 - **Political**
 - Political work including: active engagement in candidate elections, issues advocacy, and ballot initiatives on behalf of charter schools

CCSA Advocates Goals

1. Creating a healthy environment at the state level
2. Creating healthy environments locally
3. Increasing the political influence of the California charter school community
4. Supporting our funding and facilities equity priorities

What Can You Do?

- Short-term
 - C.I.V.I.C.S. – charter school stakeholder education and registration effort
 - Goal: Raise awareness and engagement of charter school grassroots community in the political process
 - Build a movement!
 - If you are in an area where we've got a key race, get out and volunteer
 - Help get your charter school community out to vote!
 - Talk with us about more detail on these activities

Important Things to Know

- There are rules about election participation that impact what and how you can do this work
- This work is not scary when you know the rules
 - But, there are consequences if you don't
- In general, non-partisan work is acceptable but taking a position on candidates and supporting them with school resources is not!
- As an individual, you do not ever lose your First Amendment Rights just because you run a school
- See our FAQs to help guide you

Questions?

- Contact Gary Borden at gborden@ccsaadvocates.org
- Please visit CCSA Advocates website and sign up for our weekly updates on election activity across the state
- Look for our event(s) at CCSA Conference




C.I.V.I.C.S. California Informed Voters In Charter Schools



Nonpartisan Civic Engagement for Election 2012





Get Started Today!

1. Get Educated
 - ✓ What's on the Ballot
 - ✓ Dos and Don'ts for 501 (c)(3)'s
2. Identify Volunteer Leaders
3. Make a Plan to Engage Your School
 - Voter registration
 - Voter Education
 - Get-out-the-vote
4. Measure Results



Local Events, Activities, and Resources



- C.I.V.I.C.S. Handbook is online now
- FAQ on Candidates and Ballot Measures
- Online voter registration at www.sos.ca.gov

For more information, visit <http://www.calcharters.org/2012/07/california-informed-voters-in-charter-schools-civics.html>



Renewals



- Meet with LAUSD Charter Division in October (date TBD) to get updates on the Renewal Process (expectations, timeline, requirements, boilerplate concerns)
 - Applying the School Performance Framework to Renewing Schools
 - Update on Extended Renewal – Gates Compact Project
- Join Renewals Box folder
- Submission by September 15th recommended
- Submission by Nov 1 for Prop 39

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LACOE STERS/PERS Concerns

- In 2007-2008 LACOE and LA County Charter Schools mutually agreed to recognize that LACOE fees were not being funded by the CDE and collaborated to set up system to recover LACOE operating expenses from Charter Schools. These fees started in 2008-2009
- In 2011-2012, after numerous years of status quo, LACOE re-engaged Charter Schools with a new proposal to recoup escalating Operating Costs. Several meetings were held at LACOE, but no consensus was reached.
- Subsequently, on June 1, 2012, LACOE issued Information Bulletin #271, informing Charter School of its unilateral intent to levy the new proposal to reallocated approx. \$1.9 million in Operating Costs to the 233 Charter Schools in LA County.
- Charter School Representatives and CCSA have sought and explanation and attempted to engage LACOE to explain, reduce or mutually mitigate these fees.
- This new fee structure is on top of a new STRS/PERS reporting deadline seeking date from Charters within 5 days, that is not needed by the Retirement reporting agencies for 45 days.

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C-12500:12:13

LOS ANGELES COUNTY OFFICE OF EDUCATION
AND/OR RETIREMENT REPORTING
SERVICES FOR CHARTER SCHOOLS

AMENDMENT NO. 1
TO
CONTRACT
FOR

HUMAN RESOURCES, BUSINESS AND FINANCIAL (PEOPLESOFT), PAYROLL
AND/OR RETIREMENT REPORTING
SERVICES FOR CHARTER SCHOOLS

The LOS ANGELES COUNTY OFFICE OF EDUCATION, a public educational agency located at 9300 Imperial Highway, Downey, California 90242-2890, hereinafter referred to as "LACOE", and

Palisades Charter High School, hereinafter referred to as "Charter School", mutually agree to amend the existing Contract C-12500 as follows:

- Section 2 Term, of the original contract, shall be amended to extend the contract term through June 30, 2013. Updated Exhibits 2 and 3 are attached hereto and made a part hereof.

This Amendment is effective upon execution. Any dates set forth in the original Contract and/or prior Amendment(s) shall be deemed updated/revise, if necessary, to be compatible with this Amendment. All other terms and conditions of the original Contract and/or prior Amendment(s) shall remain the same.

LOS ANGELES COUNTY PALISADES CHARTER HIGH SCHOOL
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4. RESPONSIBILITIES OF CHARTER SCHOOL

- Charter school agrees to send the retirement reporting file for a calendar-month accrual period to LACOE no later than the 5th of the following month. The employer and employee contributions for that period should be remitted to LACOE by the 1st of the following month. If LACOE does not receive the retirement reporting file and the corresponding payments by the established deadlines, the file will not be submitted to CalSTRS and/or CalPERS.
- Charter school may employ an outside vendor or payroll services agency to submit regular monthly retirement reporting information. Vendor or agency will coordinate all reporting with LACOE Division of School Financial Services Retirement Reporting Unit, and Division of Technology Services.
- Charter school will not begin retirement reporting until designated and both LACOE divisions mentioned above have accepted payroll service agency vendor file.
- Charter school agrees to notify LACOE of outside vendor or payroll services.
- Charter school agrees to adhere to all current and future timelines as established by LACOE relating to LACOE submission of CalSTRS/CalPERS. Charter School is solely responsible for accuracy of all data and compliance with timelines, deadlines, and security.
- Charter school will submit CalSTRS/CalPERS required reports to LACOE, including a copy of the payroll register, by first day of following month payroll is paid.
- Charter school accepts financial responsibility for all CalSTRS and CalPERS penalties and interest resulting from incomplete, inaccurate, or late reports and/or inadequate or late deposits.
- Charter school agrees to reimburse LACOE for all CalSTRS and/or CalPERS penalties and interest.

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LACOE STERS/PERS Concerns

Over the past year, LACOE has implemented two drastic changes to its Business Services procedures and protocol. Both changes place severe financial burdens on charter schools in LA County.

1. In December 2011, LACOE changed the reporting deadline for the retirement contributions process from the 15th of the month to the 5th of the month. This deadline is almost impossible for charters to meet thus they face steep penalties. ***We wish to move the deadline to report retirement to the 10th of the month and not the 5th, this allows charter schools enough time to produce accurate data/estimating.***

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LACOE STERS/PERS Concerns

2. In May 2012, LACOE unilaterally changed the fee arrangement/cost for the annual Business Services expense reimbursement structure. LACOE moved from the traditional cost based on amount of employees to a base cost plus line fee. Although this change is an effort to equally charge schools – LACOE has never provided sufficient data that show the true costs of Charter Services, currently budgeted at \$1.9 million. ***We wish to hold LACOE more accountable and we ask they provide more transparency regarding how they track costs for processing charter school retirement fees. We wish to revisit how these costs are truly accrued.***

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LAUSD Zimmer Resolution

**Rally Tuesday, October 9th, 11am!!!
Arrive at 8:30am**

- Bus Reimbursements available
- Goal: 3,000 parents and supporters
- Engage board members this week via fax, email, circulate petitions and phone calls
- Resources (flyers, petition forms, robo-call language) on www.familiesthatcan.org

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Thank you...



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Hope to see you at the next Region Charter
Leaders' Meeting in January 2013!

Don't forget to complete an evaluation form.
We value your feedback as we continue to
improve these meetings...

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