Florida Association of Charter School Authorizers
Charter School Annual Report Rubric

Introduction

Best practices in charter school authorizing include the transparent sharing of information about individual charter schools through the publication of an annual report on each school. As the National Association of Charter School Authorizers defines in its Principles and Standards for Quality Charter School Authorizing, each quality authorizer "Evaluates each school annually on its performance and progress toward meeting the standards and targets stated in the charter contract, including essential compliance requirements, and clearly communicates evaluation results to the school's governing board and leadership." The Florida Association of Charter School Authorizers (FACSA) has prioritized these annual reporting practices in creating shared resources for authorizers across Florida to leverage for improving outcomes for students across Florida. This rubric is intended to be a resource for authorizers across Florida that is grounded in research, national best practice and Florida statute and regulations, while giving authorizers the flexibility to customize as needed for the individual contexts in which they operate. It will also be accompanied by a report template to help make this detailed information digestible for a range of stakeholders.

We hope that authorizers will use annual reporting for multiple purposes, including to communicate to schools and their board about performance, inform accountability processes such as charter renewal, and share information with other stakeholders interested in learning more about a particular charter school.

Rating Rubric

This section of the rubric summarizes the ratings that FACSA recommends are publicly reported and how they will be calculated. The indicators that will inform these are outlined in the next section of the rubric. Individual authorizers have the flexibility to publicly report at whatever level is most appropriate for their particular context.

	Exceeds Expectations	Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	N/A
Definition	School achieves strong outcomes for students and is well-managed and sustainable for the foreseeable future.	School generally achieves strong outcomes for students and is generally well-managed and sustainable for the foreseeable future.	School meets student needs and meets basic operational requirements and measures of organizational health.	The school does not achieve strong academic outcomes and/or does not have thee organizational systems in place to ensure continued operation.	The school does not have sufficient data.
Calculation	School exceeds on 66% of categories and meets on the remaining category.	School meets or exceeds on 66% categories and is rated as partially meets on the remaining categor(ies)?.	School receives a rating of partially meets or higher on 66% of categories.	School does not meet expectations in 2 or more categories.	School does not receive a rating in 2 or more categories.

Overall: All charter schools can be assigned an overall rating according to the following rubric, based on performance in the four following categories.

Academic Performance: Academic Performance ratings will be the same as the Florida Department of Education (FLDOE) School Grades. These grade range from A-F[1] and are based on the percent of points schools earn on a range of indicators, including four achievement components, four learning gains components, a middle school acceleration component, as well as components for graduation rate and college and career acceleration. The four achievement components are English Language Arts (ELA), Mathematics, Science, and Social Studies. Learning gains are measured in English Language Arts and Mathematics, as well as learning gains for the lowest performing 25% of students in English Language Arts and Mathematics. Middle School Acceleration is based on the percentage of eligible students who passed a high school level EOC assessment or industry certification. The graduation rate is based on an adjusted cohort of ninth grade students and measures whether the students graduate within four years. College

[1] School Grading Scale: A = 62% of points or greater, B = 54% to 61% of points, C = 41% to 53% of points, D = 32% to 40% of points, F = 31% of points or less

and Career Acceleration is based on the percentage of graduates from the graduation rate cohort who earned a score on an acceleration examination or a grade in a dual enrollment course that qualified students for college credit or earned an industry certification. We will also report out on comparative school performance for school grades and other key indicators.

For purposes of this, FACSA recommends an "A" grade being equivalent to "Exceeds Expectations", a "B" grade being equivalent to "Meets Expectations", a "C" or "D" grade being equivalent to "Partially Meets Expectations", and an "F" grade being equivalent to "Does Not Meet Expectations."

Financial Performance: Schools will be given a rating for Financial Performance according to the following rubric. This category includes both short- and long-term measures of financial health.

	Exceeds Expectations	Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	N/A
Definition	School is in strong financial health currently and is on pace to be financially sustainable in the long term.	School is in strong financial health currently and is on pace to be financially sustainable in the long term according to most indicators.	School is generally stable financially but has areas of concern around long term sustainability.	School is not currently financially stable.	Insufficient data is available to rate the school.
Calculation	School meets expectations on 100% of short-term and sustainability indicators.	School meets expectations on 90% of short-term indicators and 65% of sustainability indicators.	School meets expectations on 60% of short-term indicators.	School does not meet expectations on 60% of short-term indicators.	School does not receive a rating on 50% or more of indicators.

Operational Performance: Schools will be given a rating for Operational Performance according to the following rubric. This category includes measures related to enrollment, discipline, Human Resources, governance, and how well the school is serving subgroups of students.

	Exceeds Expectations	Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	N/A
Definition	School is well-managed operationally and implements best practices across relevant categories.	School is generally well-managed operationally and generally implements best practices	School is generally well-managed operationally but struggles in 1-2 key areas.	School operation management is insufficient to ensure continued school operation.	School does not have sufficient data available to report on its operational management.

		across relevant categories.			
Calculation	School meets expectations on 100% of indicators.	School meets expectations on 75% of indicators and does not have more than 1 rating of does not meets expectations within each of the sub-categories.	School meets expectations on 60% of indicators.	School meets expectations on less than 60% of indicators.	School does not receive a rating on 50% or more of indicators.

Compliance: Schools will be given a rating for Compliance according to the following rubric. This category includes financial reporting, facilities, healthy and safety, and other authorizer specific submission requirements.

	Exceeds Expectations	Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	N/A
Definition	School is in compliance and implements best practices across relevant categories.	School is generally in compliance and generally implements best practices across relevant categories.	School is generally in compliance but struggles in 1-2 key areas.	School is out of compliance which endangers continued school operation.	School does not have sufficient data available to report on its level of compliance.
Calculation	School meets expectations on 100% of indicators.	School meets expectations on 75% of indicators and does not have more than 1 rating of does not meets expectations within each of the sub-categories.	School meets expectations on 60% of indicators.	School meets expectations on less than 60% of indicators.	School does not receive a rating on 50% or more of indicators.

Indicator Level Rubric

These are the indicators within each category that will be used to calculate the ratings summarized in the prior section, as well as the standard to assess if a particular school meets expectations on that indicator as well as some suggested data sources for authorizers to evaluate school performance on that indicator. Indicators marked with a * are those that FACSA identified as most critical, although authorizers are of course free to choose any indicators that meet their needs. These are not weighted more heavily to allow for authorizers to pick and choose, but authorizers may choose to weight some indicators more heavily. Note that this is not provided for the Academic Framework as the rating is taken from the FLDOE but more information on FLDOE School Grades is available here.

Financial Performance Framework: This category includes indicators related to both short-term financial health and sustainability which is more targeted towards long-term financial health.

Sub-Category	Indicator	Meets Expectations standard	Data Source
Near Term	Current Ratio*	Current Ratio is between 1.0 and 1.1 and one-year trend is positive (current year ratio is higher than last year's)	Audit
	Unrestricted Days Cash*	Between 30- and 45-Days Cash and one-year trend is positive	Audit
	Enrollment Variance*	Enrollment Variance equals or exceeds 95 percent in the most recent year	Audit
	Debt Default	School is not in default of loan covenant(s) and/or is not delinquent with debt service payments	Audit
Sustainability	Total Margin*	Aggregated Three-Year Total Margin is positive, and the most recent year Total Margin is positive	Audit
	Debt to Asset Ratio*	Debt to Asset Ratio is less than 0.9	Audit
	Cash Flow*	Multi-Year Cumulative Cash Flow is positive, Cash Flow is positive in one of two years, and Cash Flow in the most recent year is positive	Audit
	Debt Service Coverage Ratio	Debt Service Coverage Ratio is equal to or exceeds 1.1	Audit
	Facility Costs	Facility costs are less than 20% of total revenue	Audit
	Instructional Expenses	Instructional expenses are more than 50% of total expenses	Audit

Operational Performance Framework: This category looks at the key functional areas that are essential to the successful operation of a charter school beyond academic outcomes.

Sub-Category	Indicator	Meets Expectations standard	Data Source
Enrollment	Recruitment and Admission Procedures*	The school complies with all requirements around non-discriminatory recruitment and retention procedures.	Enrollment Procedure; Parent Handbook; Parent Complaints
	Student Retention*	Student retention rates are on par with the local district.	Enrollment Records/SIS
	Serves comparable* demographics	The school's population of student subgroups (Students with disabilities, ELL, economically disadvantaged) is on par with the local district.	Enrollment Records/SIS
Governance	Open Meeting Laws*	The school's governing board complies with laws governing open meetings, including posted notice, agendas, and opportunity for public comment.	School website; Governance Submissions
	Public Records*	The school complies with public records laws, including board minutes and board composition.	School website; Governance Submissions
	Key Policies in Place and Followed, Including COI*	The board has policies in place around conflict of interest and ethics, and there is not evidence these are being violated.	School website; Governance Submissions; Board Handbook and Bylaws; Notices of Concern
	Management Company*	Contract in place between management company and school that clearly outlines roles and responsibilities, fees, and accountability mechanisms.	Management Contract
Discipline	Compliance With Statute*	Expulsion decisions are made in alignment with statute.	Discipline Records; Discipline Policy; Notices of Concern
	Disproportionality of Discipline Incidents	Discipline incidents do not disproportionally impact particular demographic groups.	Discipline Records; Discipline Policy; Notices of Concern
	Suspension and Expulsion Rate	Suspension and expulsion rates are no more than 5% higher than the local district.	Discipline Records; Discipline Policy; Notices of Concern

HR	Hiring Practices	Hiring practices comply with all applicable employment law, including being non-discriminatory and equal opportunity.	Employee Handbook; Site Visits
	Teacher Qualification*	The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements.	HR records
	Staff Retention*	The school has an annual staff retention rate of 70% or higher.	HR records
	Background Checks*	School complies with all legal and contractual obligations regarding background checks.	HR records; notices of concern
Serving Special Populations	Special Education-IEPs	IEPs are updated annually and include all required components.	IEP Database
	Special Education-Service Provision*	There is not evidence that services required in IEPs are being denied.	IEP Database; Site Visits; Parent Complaints
	Special Education-Discipline	Discipline of special education students follows applicable statutes.	Discipline Policy; Discipline Data
	ELL-Service Provision*	There is no evidence that ELL students are being denied services related to language development.	Schedule; Site Visits; Parent Complaints

Compliance Framework: This category looks at the degree to which schools are in compliance with the most essential statutory and authorizer requirements.

Sub-Category	Indicator	Meets Expectations standard	Data Source
Financial Reporting	Budget*	The school's budget is submitted on time, board approved, and includes realistic projections.	Budget Submission
	Audit*	School does not receive any material findings on its audit.	Audit
	Reporting*	All quarterly reports, AFR, and audit submitted in a timely manner	Submission Tracker (i.e., Epicenter)
Facility	Inspections and Drills Completed*	School provides evidence that facility meets all safety requirements,	Submission Tracker (i.e., Epicenter)

		including inspections, drills, and elevator reviews.	
	Lease/Title Secured*	School can produce a lease for the upcoming school year no later than May 1st of the prior year.	Submission Tracker (i.e., Epicenter)
	Accessibility*	School can provide evidence that facility meets all accessibility requirements.	Submission Tracker (i.e., Epicenter)
Health and Safety	Nursing	School has staff and systems to provide all required health support to students; there is no evidence services are not provided.	Site Visit; Parent Complaints
	Food Services	School has staff and systems to meet all food service requirements.	Site Visit; Parent Complaints
Other Submission Requirements	Authorizer Required Submissions*	School meets all submission deadlines.	Submission Tracker (i.e., Epicenter)
	Day and Time Requirements*	School provides an educational program that meets requirements for instructional days and minutes.	Submission Tracker (i.e., Epicenter)