



CACSA Model Materials:

Overview of Annual Report Template and Site Visit Rubric

Overview: Read this first

CACSA has produced a set of materials for charter school authorizers to assist with Annual Reports and Site Visits. These products were produced for CACSA by the Grand Isle Group and are available now on the CACSA website. Given the challenges with CACSA member feedback during the COVID Pandemic, we have not had as much user feedback during the development as we would have liked. We are releasing these documents as “interim” documents now and hope to hear from CACSA members and other stakeholders about how they can be refined before “final” versions are released at a later date.

Site Visit Rubric: The Site Visit Rubric is intended to inform a variety of oversight strategies, including school walkthrough, classroom observation, document reviews, and interviews with school leaders and charter school governing boards. You can view the Site Visit Rubric [HERE](#). This site visit review covers the following topic areas:

- Instruction;
- Educational program: curriculum/materials;
- School culture & discipline;
- Board governance;
- Board legal obligations;
- Safety; and
- Special education files.

Annual Report Template – Excel File: This excel file includes the annual report template as well as a tab that users can use to paste state data and space to assess other background information that feeds into the annual report template. This file does not summarize data for each of the four domains that it covers. Instead, an authorizer will have to decide how they weight and value the elements contained in that domain. You can view the Annual Report Excel file [HERE](#). The annual report templates address the following topics:

- Academic performance;
- Board governance;
- Legal and contractual compliance; and
- Financial performance.

Mock-up Examples of Annual Reports – Power Point Files: Authorizers can use the Excel file to generate the tables that they can then cut and paste into a two-page layout using Power Point. Two mock-ups of possible layouts for annual reports are included as Power Point files, as well as in PDF files that can be generated using Power Point.

These two versions of the layout differ in the order in which they present data on the four domains, of academic performance, legal and contractual compliance, governance, and financial performance. Users may be interested in emphasizing academic performance and include a detailed breakout of academic performance on Page 1 of the final. Alternatively, to emphasize the four domains more equally, the academic domain is presented after the other domains in one of the mock-ups. Each mockup of a report includes areas for general information on the school, and a summary across all four domains at the top. They then list more detailed information on each of the indicators used in the four domains. The Mock-up emphasizing Academic Performance is available [HERE](#), and the mock-up presenting the other domains before the details on academics is available [HERE](#).