

# Minnesota Guild of Public Charter Schools

## *Operating Guide*

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## Executive Summary

American educator and innovator Albert Shanker introduced the seminal notion of charter schools to the American public in 1988. He envisioned the charter school model as a means to enable small groups of teachers and parents to use research-based proposals to educate kids in innovative ways, tapping into teacher expertise to try new things and leverage team approaches to learning, organization and management. This model was to be built on a shared commitment to competence and accountability.

Over the course of his career, Shanker became convinced that the best way for teachers to improve the profession was to focus on quality. If teachers could influence the quality of public-school teaching, they could fully realize the profession's goals of helping all children achieve their potential and become successful citizens.

A spirit of innovation and commitment to quality have long been hallmarks of education in Minnesota, which enacted the Nation's first charter school law in 1991 and launched the first U.S. charter school. Numerous quality initiatives have been developed to improve teacher preparation, peer and mentor support, ongoing professional development, instruction standards and approaches to compensation and evaluation. One of the leaders in this effort to improve teacher professionalism has been the Minneapolis Federation of Teachers (MFT), which most recently launched Minnesota's teacher-led Self-Governed Schools initiative.

MFT's legacy led to an Innovation Grant from the American Federation of Teachers (AFT) for the purpose of establishing an entity to authorize Minnesota charter schools: The Minnesota Guild of Public-School Charter Schools (*The Guild*). Minnesota Statue 124E.10 gives approved authorizers the authority to approve or deny charter school applications, monitor charter school operations and hold charter schools accountable for their mission and statutory requirements.

The Guild will support the establishment and operation of charter schools that embody the very best practices in teaching, learning and student achievement, built on a sustainable base of operating efficiency and community engagement. In doing so, the Guild will do more than help students, teachers and families in Guild-authorized schools work more effectively to attain high standards and achievement. Success in this effort will lead to more models of demonstrated impact to benefit students across Minnesota and the Nation, ultimately realizing Shanker's hope for charter schools as a major impetus to create public school education for the 21<sup>st</sup> Century.

## Guild Mission & Vision

**Vision:** The Guild advances the original vision of the chartered school model, in which teachers have the choice to professionally organize and work to create innovative, research-based schools that rely on teacher expertise to identify and use effective teaching strategies, promote engaged student learning, create professional autonomy, and ensure effective, shared responsibility for outcomes.

**Mission:** As a single purpose authorizer, the Guild will improve the educational achievement of Minnesota students by advocating a systemic approach to charter school formation and operation that promotes stakeholder accountability, autonomy, and competence. The Guild authorizes and monitors charter schools in accordance with [Minnesota Statutes section 124E](#). The Guild’s charter school portfolio encompasses a variety of school types and populations served by educational programs in Minnesota, with a specific interest in schools that serve students most affected by the achievement gap and low graduation rates.

### **Guild Priority: Teacher-Powered Schools**

As a single-purpose charter school authorizer under Minnesota Statutes, section 124E.05, the Minnesota Guild may not limit its authorizing decisions to any single curriculum, learning program, or method. However, the Guild is committed to growing a portfolio of high-quality, innovate charter schools that promote, establish, and expand teacher-powered models and autonomies.

The teacher-powered model includes 15 areas that provide teachers autonomy to make decisions impacting school and student success. These areas of autonomy include charter school board governance, making all decisions about the school’s learning program, choosing the process and methods for teacher evaluation, and managing the allocation of the school’s financial resources. Charter schools may implement one, or many, areas of autonomy to be considered a teacher-powered school. Visit the Teacher-Powered Schools Initiative web page for additional information and resources.

Additionally, the Guild seeks to promote and is especially interested in authorizing new charter schools that address the additional statutory purpose (Minnesota Statutes, section 124E.01, subdivision 1(5)), “create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site.” Finally, the Guild’s new charter school application is aligned with the priorities, criteria, and requirements of Minnesota’s Federal Charter Schools Program (CSP) grant project.

## Minnesota Charter School Purpose

Minnesota Statute 124E.01 states that the purpose of charter schools is to:

**Improve all pupil learning and all student achievement.**

Additional purposes include to:

- (1) Increase learning opportunities for pupils;**
- (2) Encourage the use of different and innovative teaching methods;**
- (3) Measure learning outcomes and create different and innovative methods of measure outcomes;**
- (4) Establish new forms of accountability for schools; or**
- (5) Create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site.**

## Guild Structure & Governance

The Minnesota Guild of Public Charter Schools is governed by a volunteer Board of Directors. These volunteer leaders, who receive no compensation for their service, exemplify a deep commitment to educational excellence and represent expertise from multiple sectors. They are charged to review, approve or deny new charter school applications, renewal applications and termination recommendations; supervise the Guild Executive Director and determine future staffing, fiscal and resource needs; and ensure the ongoing viability, compliance and sustainability of the Guild and its operations.

There will be at least five members of the Board, whose members are selected to provide expertise in charter school authorization principles and practice, best practices in teacher professional development and education, and organizational systems compliance, monitoring, metrics, management and strategic planning. In carrying out their reviews, Board members will read and discuss recommendations, meet with charter school representatives and visit authorized schools.

## Guild Board of Directors

A current listing of Guild board members can be found on the Guild's website at [this link](#).

## Guild Director

The Minnesota Guild Executive Director directs and supports the continuous development of a model charter school authorizer that promotes and assists best practices of educational excellence and meaningful student achievement. In order to ensure success, the Executive Director works in frequent collaboration with the Guild Professional Staff, the Guild Board of Directors, the Guild Officers, each Guild School, and the Minnesota Department of Education Charter Center.

Per their operating guide, the MN Guild has established a holistic view of the systems needed for schools to achieve quality student performance, stakeholder engagement and satisfaction (students, teachers, families and communities), and effective compliance and monitoring to ensure ongoing improvement and sustainability.

Professional staff will be added to the Guild operations as the size of the school portfolio grows. Additional consultants and executive board member responsibilities will also will grow over time to ensure that the Guild meets its commitment to develop a charter school authorizing model that serves as a national best practice.

## Authorizer Fees

The Minnesota Department of Education (MDE) reviews authorizer affidavits and processes submitted by charter school authorizers. If approved by MDE, the charter school enters into a written contract with its authorizer outlining requirements as based on the Minnesota charter school statute 124E.10. The authorizer fee has been calculated by MDE Per Stat. § 124E.10, subd. 3 (b).

## Charter School Application Process

The application process is designed to help applicants assess their readiness and capacity to operate a successful charter school. The applicant will require a diverse set of expertise and experience to launch a new school.

Charter school applicants and operators must comply with all relevant requirements in Minnesota Statutes 124E which govern charter school formation and operation. They must describe how they will address the six statutory purposes of charter schools and achieve the school's mission, goals, program and student performance. They must describe plans for governance, administration, operations and financial management and evaluation of educational effectiveness, organizational and fiscal plans.

The comprehensive requirements of MDE and the Guild are designed to ensure that applicants build a proper foundation to optimize success for the school's stakeholders.

## **New School Application**

The New School Application, process and timeline are posted to [The Guild's website](#).

## **Existing Charter Schools- Change in Authorizer**

Schools that wish to transfer from their current authorizer to the Guild will submit the Intent to *Apply – Transfer of Authorizer* form at least six months before their current authorizer contract ends. This submission will include the rationale for change along with:

- Resumes for the school leaders, team members and board members
- Articles of incorporation and Bylaws
- Current authorizer contract
- Audited financial statements for past 3 years
- Annual reports for the past 3 years
- Standardized student test results
- The most current stakeholder satisfaction data

The Guild will arrange a personal visit to the school to interview staff, students and parents, and observe the program to assess strengths, needs and levels of quality. The Guild also will contact the school's current authorizer to learn about their experience with the school and current views regarding the school's capacity and performance. This data will be reviewed by Guild staff within 30 days of receipt of the request. Staff will forward the request to the Executive Board with a recommendation to accept an application or provide feedback to the school on why a recommendation will not go forward. They also may recommend deferring the application until a different point in the contract cycle. The Executive Board's determination will be communicated to the school within 30 days from the time it is received from Guild staff.

In evaluating a school's request, Guild staff will consider the Guild's:

- Capacity to review applications at the time
- Capacity to authorize additional schools at the time
- Strength of the school's performance in student achievement, fiscal and operational quality

If the Executive Board of Directors agrees to consider an application, the school will be asked to complete the *Application – Existing Schools*. This application will require the school to submit its Statutory Purposes, Vision and Mission Statements, Goals and Student Performance Expectations, Educational Program Model, Evaluation Plan and School Capacity, Governance Plan, Financial Management Plan, Administration Plan, and Operations Plan. The applicant will submit documents including:

- All board policies
- Enrollment policies/procedures
- Handbooks for Staff, Parents & Students
- Documentation of federal tax---exempt status
- Daily Schedule
- Annual Calendar
- Student retention data for the past three years
- Job descriptions for lead administrator, teachers & other key employees
- Staff development plan for last 3 years
- Analysis of student test data & any other data documenting student success
- STAR Report for the last three years
- Summary of any awards and recognitions received (include MDE Financial Awards if received)
- Authorizer renewal contract if received
- Copies of reports to the authorizer
- Strategic plan (optional)
- Current School Improvement Plan if the school has one
- Statutory Operating Debt plan if the school is in SOD
- Board meeting minutes for the past twelve months
- Budgets for current and previous school years & projected budget for next year if available
- Enrollment projections for the next two years
- Lease agreement
- Documentation of liability insurance
- Documentation of any litigation involving the school during the past 2 years to the extent data practices permit

The *Application – Existing Schools* describes the requirements and timeline in detail. The Guild Executive Board has authority to consider and grant modifications to due dates in exceptional circumstances.

## Start-Up Monitoring & Oversight

After new school applicants are approved by MDE, the Guild will monitor school start-up progress through monthly evaluations of the School Launch Process, which details deliverables, timing and accountability. This tracking template aids in ensuring that all essential components are identified, implemented and communicated. Key elements include:

Purpose & Metrics	People	Place
<ul style="list-style-type: none"> <li>▪ Learning program</li> <li>▪ Fiscal management</li> <li>▪ Governance &amp; Compliance</li> </ul>	<ul style="list-style-type: none"> <li>▪ Teachers/Leadership</li> <li>▪ Students</li> <li>▪ Families &amp; Communities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Facilities</li> <li>▪ Operations</li> <li>▪ Transportation</li> </ul>

### Critical Milestones

The School agrees to the following **significant** target dates effective for the months immediately preceding school opening:

March: Facility secured

May 1: Database of *interested* students/families that is 125% of budgeted enrollment

May 10: Significant renovations/buildout to facility have begun

May 31: 75% of projected budgeted students *officially enrolled*

June 30: 75% of key administrator(s) and teaching staff have been hired

Where a significant target date is not met, the School will submit a written plan to The Guild detailing how the condition will be remedied **within thirty (30) days of the significant target date**. If requested by The Guild, due to the School's failure to meet a significant target date or comply with Applicable Law or other grounds, the School will delay opening of the School one academic year.

The Guild will make ready-to-open decisions no later than June 30, before a new charter school may begin serving students. Monthly financial reporting to the Guild is initiated when the school begins receiving public funds.

The Guild has the right to terminate the charter contract with the School if the School fails to open as scheduled for two (2) consecutive years.

## School Oversight

After a school has met rigorous requirements for authorization, the Guild initiates an ongoing system of oversight to monitor and review the accountabilities the school must fulfill to meet its performance goals and commitments. These accountabilities are defined by statute and in the contract the school signed with the Guild, which will perform the monitor/review function as follows:

Guild Oversight Accountability Review	
Governance Performance	<ul style="list-style-type: none"> <li>▪ Attend at least two charter school board meetings annually.</li> <li>▪ Review the School Annual Report for compliance with the Contract Agreement.</li> </ul>
Student/Professional/School Performance	<ul style="list-style-type: none"> <li>▪ Review the School Annual Report for compliance with the Contract Agreement specifically for data that may provide insights on progress, potential issues or trends relative to student, professional &amp; school performance.</li> <li>▪ Review the MDE School Report Card for student performance information, identify &amp; discuss any potential areas of concern relative to the Contract.</li> </ul>
Fiscal Performance	<ul style="list-style-type: none"> <li>▪ Review monthly financial statements provided to the school's board &amp; comment as necessary.</li> <li>▪ Review the school's annual budget and provide comments as necessary.</li> <li>▪ Review the school's Annual Financial Audit and identify any areas of concern based on the provisions of the Contract Agreement.</li> <li>▪ Review the reserves plan compared to actual performance.</li> </ul>
Operations Performance	<ul style="list-style-type: none"> <li>▪ Review school board meeting minutes to monitor policy compliance &amp; identify areas requiring policy revisions.</li> <li>▪ Review school compliance with required state reporting deadlines &amp; all applicable laws including student admissions, teacher licensing &amp; special education requirements. Identify any concerns relative to the Contract Agreement.</li> <li>▪ Conduct an annual site visit using the Annual Site Visit form to review operations, interview stakeholders (students, staff, parents, community members) &amp; discuss school/authorizer issues.</li> <li>▪ Visit the school at least one additional time during the school year &amp; attend a sampling of school student activities.</li> </ul>

# School Evaluation

The Guild will evaluate the performance of its authorized schools using Performance Indicators selected to support school accountability. The content of what will be reviewed for evaluation and review frequency is described below. The Guild will use this process to provide ongoing input to schools about their status and to help schools enable continuous improvement toward fulfillment of their goals.

Guild Evaluation Performance Indicators	
Students	<ul style="list-style-type: none"> <li>▪ Percentage of students meeting or exceeding state standards on state tests (MCA---II). Reading: Grades 3---8 &amp; 10; Math: Grades 3---8 &amp; 11.</li> <li>▪ Annual results in mathematics &amp; reading show regular &amp; consistent increases in student performance with rates of change equal to or greater than other entities in the district, state, the nation, or regional schools with similar demographics.</li> <li>▪ Reported growth measures in mathematics &amp; reading show that students performing at grade level make at least one year’s expected growth when receiving one year of opportunity to learn. Struggling students make accelerated growth when receiving one year of opportunity to learn.</li> <li>▪ In addition to mathematics &amp; reading, additional school goals have student baselines &amp; are measured annually against school targets.</li> <li>▪ State and federal accountability targets for attendance &amp; graduation will be reflected as performance targets, measured &amp; reported.</li> <li>▪ Through the school’s annual report, the school will report out: (1) How the school is meeting the primary purpose of charter schools (to improve all pupil learning and all student achievement), and (2) any additional statutory purposes as listed in the contract between the MN Guild and the school</li> </ul>
Program	<ul style="list-style-type: none"> <li>▪ The program is clearly connected to the school’s mission.</li> <li>▪ The program model is implemented consistently, fulfilling the Contract Agreement &amp; statutory provisions.</li> <li>▪ Surveys/other research document levels of stakeholder understanding of the mission &amp; program.</li> <li>▪ Curriculum is identified for its linkage to mission &amp; program &amp; is aligned to the Minnesota Academic Standards.</li> <li>▪ Surveys/other research detail staff evaluation of professional development &amp; its efficacy in supporting the school mission &amp; program model.</li> </ul>
School	<ul style="list-style-type: none"> <li>▪ Student retention rates show improvement over time for all student groups enrolled in the school.</li> <li>▪ Stakeholder input (from students, staff, parents, community members) via research &amp; communication tools indicate satisfaction levels with the school’s learning environment, capacity to achieve results &amp; engagement levels.</li> <li>▪ Student, staff &amp; parent measures indicate whether the school environment is perceived as safe for all students.</li> </ul>

Fiscal	<ul style="list-style-type: none"> <li>■ School budget is approved by its Board &amp; used as an ongoing tool to guide expenditures. It is amended appropriately as needed to accommodate changes such as increases/decreases in enrollment.</li> <li>■ Annual audit &amp; monthly reports indicate that school finances are being closely monitored &amp; appropriately managed.</li> <li>■ State finance reports are filed appropriately &amp; on time.</li> <li>■ State/federal taxes, pension, insurance &amp; other required payments are timely &amp; accurate.</li> <li>■ Budget includes revenue to be used as a reserve fund for future unanticipated needs.</li> <li>■ Expenditures are consistent with the school’s mission, program &amp; goals.</li> <li>■ School audit contains no material findings.</li> </ul>
Operations	<ul style="list-style-type: none"> <li>■ Board is organized according to state law and follows good governance practices:</li> <li>■ No conflicts of interest for any members</li> <li>■ Complies with Minnesota open meeting law</li> <li>■ Follows stated by---laws</li> <li>■ Adopts required policies</li> <li>■ Oversees school strategy</li> <li>■ Follows defined meeting process with published agenda &amp; minutes.</li> <li>■ <i>The Board makes key decisions:</i> <ul style="list-style-type: none"> <li>• Sets school policies</li> <li>• Sets performance expectations consistent with the authorizer contract</li> <li>• Adopts an annual budget &amp; monitors/reviews the budget regularly</li> <li>• Approves all expenditures</li> <li>• Reviews &amp; accepts the annual audit</li> <li>• Reviews school academic performance regularly</li> <li>• Reviews the annual report</li> <li>• Adopts an educational improvement plan</li> <li>• Reviews performance of the school’s leader(s) at least annually</li> <li>• Board improvement plan includes annual training</li> </ul> </li> </ul>
Leadership	<ul style="list-style-type: none"> <li>■ School <i>leadership ensures:</i> <ul style="list-style-type: none"> <li>• Board policies are implemented</li> </ul> </li> <li>■ School professionals: <ul style="list-style-type: none"> <li>• Meet state qualifications/licensure requirements’</li> <li>• Selection process is fair &amp; appropriate</li> <li>• Collaboration is ongoing/planned</li> <li>• Assignments &amp; turnover are reasonable</li> <li>• Development is robust/integrated</li> <li>• Strategies for improvement/innovation</li> <li>• Peer Review Process (Minn. Statute 122A.41)</li> <li>• Minn. State Standards of Effective Practice for Teachers (Rule 8710.2000)</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>▪ Enrollment process is followed</li> <li>▪ Transportation system is effective</li> <li>▪ Food/nutrition program is effective</li> <li>▪ Enrollment projections are reasonable</li> <li>▪ Facilities are appropriate &amp; lease is compliant</li> <li>▪ State reporting is accurate &amp; timely</li> <li>▪ Appropriate insurance is acquired &amp; maintained</li> <li>▪ Complaint report &amp; resolution procedures work</li> <li>▪ Compliance programs &amp; audits for: <ul style="list-style-type: none"> <li>• Non-discrimination policies</li> <li>• Health &amp; safety programs</li> <li>• English Language Learner programs</li> <li>• Gifted &amp; Talented needs</li> <li>• Students with Disabilities needs</li> </ul> </li> </ul>
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## School Monitoring & Intervention

Intervention is triggered when the Guild identifies a potential or definitive issue that could affect the school’s compliance with its Contract Agreement. Such issues may be identified during the routine monitoring practices used for oversight or brought to the Guild’s attention via other channels such as the news media. Monitoring practices include informal and Annual Site Visits, phone conferences with the charter school director or Board members and review of documents relevant to Performance Indicators.

Monitoring will occur:

- Monthly for schools in year one of operation
- Quarterly for schools beyond year one but still in the first term of the authorizing contract
- Annually for schools that have completed one full review cycle

If an issue is surfaced that causes reason for concern, the Guild will monitor the situation, its proposed remedy and key milestones to ensure the issues are addressed. The Guild may employ a variety of techniques to review the situation, such as a letter of inquiry, informal or formal site visits, an audit, a review of documents/records, interviews or letter of demand to come into compliance.

During this process the Guild will expect active participation by the school leaders and board of directors to resolve the need in an appropriate and timely manner, and when needed, to submit a written plan of correction to the Guild. This plan will be approved by

the Guild prior to implementation. The school will then submit status reports to the Guild according to the plan.

Guild intervention will be tailored to the nature of the situation and its potential to cause the school to be noncompliant with its contract. Depending on the seriousness of the issue and the school's response, the Guild Executive Board of Directors will evaluate whether the school is able to meet or make reasonable progress toward meeting its academic and program goals and whether the school's contract should be terminated. Examples of issues that could trigger contract revocation include violations of Conflicts of Interest policies, financial improprieties, improper school board election procedures or admissions procedures, child abuse, unlicensed teachers, allegations of sectarian activities, open meeting law violations or other legal improprieties.

## Communications

Effective communication is key to understanding the progress and success of a school. The Guild will communicate regularly with the school according to the mechanisms outlined in the oversight plan and contract. In return, the school is expected to initiate communications with the Guild, especially if and when the school expects to:

- Fail to achieve academic goals
- Fail to achieve financial targets
- Fail to comply with legal/regulatory requirements

In such instances, the school may submit a proposed remedy or improvement plan for feedback prior to implementation.

The Guild will issue formal communications to the school if the school fails to achieve academic goals, financial targets or comply with legal/regulatory requirements, including:

### **Notice to the School Leader or Board Chair**

The Guild will inform the school leader or board chair of specific areas that require improvement or correction and the expectations and timeline for doing so.

### **Notice to the School Board**

When improvement is not being communicated or a situation requires immediate attention, the Guild will formally notify the school board of its concerns and expectations. If a third-party investigation is called for, the investigator must be acceptable to the Guild and the school board must authorize the investigator to communicate status and reports to the Guild.

### **Notice of Charter Revocation/Termination to School Board**

The Guild will issue a formal notice when charter authorization will be withdrawn according to the charter contract.

## Application to Expand

The Application to Expand and expansion timeline are posted to [the Guild's website](#)

## Charter School Contract Template

The Charter School Contract Template is posted to [the Guild's website](#)

## Contract Renewal

The Minnesota State Charter Statute provides that the renewal and termination criteria and process be “based on evidence that demonstrates the academic, organizational, and financial competency of the school, including its success in increasing student achievement and meeting the goals of the charter school agreement.” The Guild is dedicated to authorizing schools that are both high---performing and sustainable. To that end, the Guild seeks to help schools demonstrate and document performance that enables successful renewal of charter authorizations.

Renewal applications must be submitted at least 180 days prior to the end of the current contract using the Guild Application for Contract Renewal. Applicants will receive a decision from the Guild Executive Board of Directors no later than 120 days prior to the termination of the existing contract.

Non---renewal and contract termination will occur, however, if a school violates its contract through 1) Failure to meet the accountability requirements agreed to in the contract to achieve high pupil performance and the actual student results contained in the contract; 2) Failure to meet generally accepted standards of fiscal management; 3) Violations of law and/or 4) Other good cause shown.

The Guild will conduct a formal evaluation of a school during the final year of its contract to prepare for the renewal application. This initiative is a continuation of the oversight and evaluation process used by the Guild throughout the life of the contract (see School Oversight and School Evaluation). It incorporates data gathered by the Guild, provided by the school and from external sources to provide a holistic view of the school’s performance. The evaluation will examine whether the school has fulfilled its contract requirements to improve student achievement, achieved financial stability and worked successfully with the Guild to progress on all Performance Indicators.

On receipt of a school’s Application for Contract Renewal, the Guild staff will review the application, school data/history and formal evaluation. If the school meets the performance and fiscal health tests, a recommendation will be made to the Executive Board for renewal, which will be determined within 60 days. A new contract and contract term will then be negotiated between the school and the Guild.

## Contract Non-Renewal & Termination

If the Guild selects non-renewal or termination of a charter school contract for failure to meet the accountability requirements agreed to in the contract to achieve high pupil performance and the actual student results contained in the contract, the school's board will be notified of the decision in writing at least 120 days before taking action. The notice shall articulate the rationale for the proposed action. The charter school board may request in writing a formal hearing with the Guild within 15 business days of receiving notice of non-renewal or termination of the contract. Failure by the charter school board to make a written request for a hearing within 15 business days will be treated as acquiescence to termination of the contract. If the school submits a timely request for a hearing, the Guild will provide 10 business days' notice of a hearing date at which school leaders may present performance evidence including:

- Data from reports previously submitted to the Guild that is relevant to Performance Indicators
- A summary of school accomplishments and challenges not formally requested in previous reports.
- Requests for amendments and/or modifications to the contract.

The Guild will conduct the formal hearing before taking final action. If the school board requests contract amendments or modifications, the full Executive Board would have to review and approve the proposal. The Guild will act to renew or not renew a contract no later than 45 business days before the proposed date for terminating the contract or the end date of the contract. The Guild will strive to minimize disruption for the school's students and families by taking action well in advance of the existing contract's end date to the degree possible.

If the Guild and the school mutually agree to terminate or not renew a contract, a change in authorizer is allowed if the Commissioner approves the transfer to a different eligible authorizer to authorize the charter school (Minnesota Statute 124E.10 Subd. 5). Accordingly, both parties must jointly submit their intent in writing to the Commissioner to mutually terminate a contract. The authorizer holding the existing contract must inform a different eligible authorizer about the fiscal and operational status and student performance of school. "Before the Commissioner determines whether to approve a transfer of authorizer, a Commissioner first must determine whether the charter school and prospective new authorizer can identify and effectively resolve those circumstances causing the previous authorizer and charter school to mutually agree to terminate the contract. If no transfer of authorizer is approved, the school must be dissolved according to applicable law and terms of the contract."

## Charter School Closing

The closing of a school has a significant impact on its stakeholders, and therefore must be managed with the utmost care. In the event of a school closing, the Guild will ensure that a plan is thoroughly mapped and executed to facilitate the transition of students and families.

A school closing may be precipitated by a number of factors, including the inability to meet enrollment expectations, facility issues, leadership or staffing challenges involving the board of directors and/or staff, financial challenges or termination for cause. The Guild's active monitoring and oversight of a school are designed to help a school identify and resolve many challenges, but in some cases, the situation may be untenable and closure is the appropriate solution.

As an engaged overseer, the Guild will act decisively when closure is called for and monitor the plan development and execution, working closely with the affected stakeholders. The National Association of Charter School Authorizers (NACSA) has developed a Charter School Closure Plan Framework that can be adapted for any school closure situation (see below). The Guild will use this protocol, which meets the provisions of Minnesota Statute 124E.10, subd. 1(b) pertaining to school closure.

In the event of a school closure, the Guild will immediately engage the Minnesota Department of Education and legal counsel to notify them of the closure, keep them informed about plans and progress, and leverage their expertise. The Guild will identify accountability for each task and assign the timeline for execution. The Guild will partner with the school's leadership, but also assume responsibility for oversight of the closure.

## Charter School Closure Plan (Sample Framework)

School Name		Address	
Closing Date		School Contacts (Lead & External)	
<b>Actions</b>	Responsible Party	Timeline for Completion	Status
<b>Students and Families</b>			
Notify parents or legal guardians of all students enrolled as soon as the decision is made to close the school. The notice should include the closing school's plans to help students identify and transition into a new school.			
Continue current instructional program as specified in the school's charter, including administration of state---mandated assessments			
Help students find a new school			
Transfer pupil records to students' resident districts. This transfer must include disciplinary records, and the school must inform parents that disciplinary records are being sent (MN Stat. § 120A.22, subd. 7).		*Statutory language in section 120A.22, subdivision 7(b) gives 10 business days to transfer student records, which allows for the onsite pupil count audit to be completed with original records prior to the school transferring records to students' districts of residence.  Enter date here:	
<b>Staff</b>			
Make full disclosure of the situation to staff and the school board			
Terminate the employment of all staff			
Payment of state and federal payroll taxes; payment of all TRA and PERA dues			

Coordinate termination of insurance benefits			
Provide letters of recommendation for staff			
<b>Financial and Legal</b>			
General Education Aid – reconcile final Gen Ed Aid amount			
Track all Special Education expenditures (Sp.Ed. information required during a charter school closure is essentially the same information that would be required during a Special Ed. Fiscal Monitoring visit).			
Track expense information (save all invoices) for federal Planning Grant; coordinate grant wrap---up with MDE liaison including submission of final Expenditure Report			
Reconcile final Lease Aid amount			
Notify the school's lessor and address for provisions of the lease in case of school closure			
Examine contracts with vendors and arrange for their termination – seek to fulfill contractual requirements to the greatest extent possible given the school's resources			
Ensure safe keeping of the school's physical assets, financial assets, and the facility during the shutdown process			
Provide for disposal of the school's assets according to statute 317A			
File final tax returns			
Arrange for final audit			
<b>Notifications and Miscellaneous</b>			
Notify the Minnesota Department of Education/Commissioner			
Notify the local school district of the closure			
Notify the local media of the school closure – communicate proactively positive aspects of the charter school movement as well as the specific circumstances leading to this school's closure			
Notify the Offices of the Minnesota Secretary of State and Attorney General			

Notify the IRS			
Such other actions as may be necessary			

*Note: Any school closure authorized by the Minnesota Guild of Public Charter Schools will be carried out with compliance to all applicable state and federal laws and in consultation with the Minnesota Department of Education.*

# Ready to Open Checklist

**Note: While the majority of tasks listed on this checklist are required for all pre-operational schools, some tasks may not apply. In that case, a task will be marked as “Not Applicable.”**

## Governance and Management

	Task	Person Responsible	Requisite Resources	Status	% Completed	Targeted Completion Date	Actual Completion Date
1.	Ensure that a contract is signed with Minnesota Guild of Public Charter Schools within 45 business days of the commissioner's approval of the authorizer's affidavit (Subd. 6)						
2.	Review Minnesota Open Meeting Law (Statute 13D)						
3.	Establish governance structure consistent with Application						
4.	Recruit board members with expertise (e.g., education, legal, fiduciary, real estate)						
5.	Develop bylaws and obtain approval from MN Guild						
6.	Distinguish roles and responsibilities of the board						
7.	Write job descriptions for the Board of Directors and the Officers						
8.	Define committees and write descriptions						
9.	Write articles of incorporation						
10.	Establish legal status with the Minnesota Secretary of State						

11.	Secure a federal EIN – Employee Identification Number						
12.	Apply for recognition of exemption under Section 501(c)(3) of the Internal Revenue Code (f1023) and Register with the state Attorney’s General Office as a Charitable Organization						
13.	Obtain Board Liability Insurance (Directors and Officers) within 30 days of charter contract execution						
14.	Board members attend training on board governance, the board’s role and responsibilities, employment policies and practices, and financial management, commencing within six months of being seated and completed within 12 months of being seated on the board (Subd. 4 (f))						
15.	Develop a board manual						
16.	Establish a board calendar						
17.	Set up and perform ongoing process for board evaluation; Plan for board development						
18.	Establish board policy for conflict of interest; have board members sign a conflict of interest form annually						
19.	Plan for transition to a permanent board						
20.	Develop performance evaluation for administrative, supervisory, and instructional leaders according to MN§124E.12 subd. 2						
21.	Establish nexus of communication tools and methods to board members, school staff, families, community, etc.						
22.	Designate IOwA (Identified Official with Authority)						
23.	Review MDE Charter School Submissions Calendar (found at <a href="https://education.mn.gov/MDE/dse/chart/scre/">https://education.mn.gov/MDE/dse/chart/scre/</a> )						
24.	Review the MN state charter school law						
25.	Review civil rights/equity issues						

26.	Develop a health and safety policy handbook						
27.	Review contract with board						

### Personnel and Policy Development

28.	Establish hiring policies and procedures in accordance with fair and open hiring practices						
29.	Determine staffing needs						
30.	Create timeline for hiring staff						
31.	Advertise/solicit potential candidates in accordance with equitable and diverse hiring best practices						
32.	Write personnel policies/handbook						
33.	Establish terms of employment, employment contracts and job descriptions						
34.	Define expectations and protocols for pre---operational/start---up staff						
35.	Establish the process for evaluating pre---operational/start---up staff prior to the school opening						
36.	Hire pre---operational/start---up staff						
37.	Write student and parent handbook/policy manual						
38.	Create benefit packages (health, dental, etc.), vacation policies, pension policies, workers compensation, etc.						
39.	Establish process for complaints (i.e. parents, teachers, board members)						
40.	Conduct background/reference/MN license checks (this will be submitted to the Guild via Epicenter)						
41.	Create personnel and student files						

42.	Design teacher evaluation tools and systems in accordance with MN §124E.03 subd. 2 (i) and MN §122A.40 subd. 8						
43.	Design professional development and onboarding processes for staff (prior to the start of the school year, as well as throughout)						
44.	Establish enrollment and lottery policy that is consistent with both state statute and contract guidelines						
45.	Establish attendance, transportation, food services, dress code, and harassment policies						
46.	Acquire medical forms (for students and staff)						
47.	Develop a school calendar						

### Learning Program

47.	Develop the scope and sequence of learning outcomes aligned to the State Standards						
48.	Develop methods and tools to monitor and track student progress in reference to stated goals (academic, attendance, social, etc.)						
49.	Develop calendars that maximize common planning, student conferencing, parental involvement, etc.						
50.	Purchase/acquire requisite learning materials (e.g., curricula, technology, etc.)						
51.	Identify and purchase appropriate standardized assessments						
52.	Develop MN Common Course Catalog						

53.	Ensure the learning plan is equitable, accessible and anti-racist						
54.	Apply to MDE as appropriate for Online Learning, Project-based Learning and Work-based learning programs						

**Special Education**

55.	Identify and hire Special Education Director in accordance with fair and open hiring practices						
56.	Identify and hire Special Education Teacher(s) in accordance with fair and open hiring practices						
57.	Create a system for identifying special needs students						
58.	Fulfill Special Education Assurances checklist						
59.	Identify contractors for supplemental services (speech, psychologist, etc.)						
60.	Identify staff member (or contract service) responsible for Special Education record keeping procedures and district bill--back						

**School Culture**

61.	Develop a school disciplinary policy that is compliant with the MN Pupil Fair Dismissal Act (Statute 121A.40 to 121A.56)						
62.	Develop a student handbook that includes discipline policies, code of ethics, and student responsibility expectations						
63.	Train staff in the implementation of discipline policies and student conduct						

64.	Develop an intake process for students and families that is consistent with the enrollment and lottery policies						
65.	Convey school culture via communication tools						

**Community Relations/Media/Marketing**

66.	Establish a committee for marketing and community/media relations						
67.	Develop a marketing plan						
68.	Identify appropriate communities, venues, events, conduits, etc. to market the school						
69.	Identify specific strategies to reach and recruit a diverse student body						
70.	Delineate opportunities for parents, community members, volunteers, etc. during and after recruitment						
71.	Continuously update databases and reconnect with prospective students, families, volunteers, community partners, etc.						

**Community and Business Partnerships**

72.	Identify potential partners in the community and develop plan to build relationships						
73.	Identify potential funding/grant opportunities						

**Facilities**

74.	Conduct needs assessment						
75.	Evaluate/inspect potential sites; consider how the facility supports the curriculum and program						
76.	Submit Facility Inspection Report to Guild						
77.	Review codes/ordinances/regulations						
78.	Obtain resources for financing a facility						
79.	Select site --- considering expansion potential and any needed changes to facility and/or site						
80.	Negotiate lease for site						
81.	Acquire site and secure letter of intent						
82.	Enlist facility design help						
83.	Address building security issues						
84.	Secure renovation financing if necessary						
85.	Make necessary repairs/installations						
86.	Arrange for any necessary custodial/maintenance services						
87.	Establish insurance policies; See MN §124E.09 (c) and § 466.04						
88.	Initiate lease aid application						
89.	Furnish and appoint building						

**Systems/Financial Management/Business Plan**

90.	Purchase system to manage financials						
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91.	Purchase system to manage student information						
92.	Create a comprehensive business plan which includes a 3-year budget projection and 3-year market analysis						
93.	Identify a (potential) board member/s with financial experience/background						
94.	Designate financial manager for the school						
95.	Hire/contract auditor						
96.	Establish financial policies (authorities, approvals, access, etc.)						
97.	Establish separation of duties						
98.	Develop fiscal policies and internal controls						
99.	Meet with MDE re: MARSS, UFARS, ADMWE (review MDE page), lease aid and IDEAS payment system						
100.	Designate and train person in charge of MARSS reporting						
101.	Apply for planning grant						
102.	Track planning grant activities; refine grant budget if necessary						
103.	Establish relationship and open account with local banking institution						
104.	Establish a line of credit						
105.	Establish sales tax exemption						
106.	Set up finance committee; Schedule monthly board financial reviews						
107.	Establish transportation program						

108.	Establish food service program						
109.	Set up CLICS						
110.	Establish TRA, PERA						

Accountability

111.	Set ongoing schedule to review ready to open status with the MN Guild						
112.	Get set up in Epicenter						
113.	Review MDE Charter School Website Requirements and ensure all criteria are met ( <a href="https://education.mn.gov/MDE/dse/chart/scre/">https://education.mn.gov/MDE/dse/chart/scre/</a> )						

# Charter School Annual Site Visit Report

The Minnesota Guild of Public Charter Schools conducts an Annual Site Visit to each authorized school. The Site Visit includes review of previously--- requested documents, interviews with school stakeholders & observation of school operations. The Guild will contact the school leader well in advance of the site visit to schedule the time. Performance Indicators in four areas will be reviewed. Indicators are listed below, with a brief description of how a school might demonstrate whether the indicator was met. Within two weeks following the Annual Site Visit, the Guild will provide this report to the school’s leaders. School leaders will have two weeks to respond and comment on the report.

School Name & Address	Primary Contact	Phone:	Year of Operation
		E---mail:	Year of Authorizer Contract Term
Guild Representative		Visit Date	
<b>School---wide Educational Performance Indicators</b>			
School accountability plans, including goals & performance targets, are reviewed with the Guild annually. Data relating to achievement of the goals will be included in the Annual Report. The Annual Site Visit provides an opportunity for the authorizer & school representatives to discuss all aspects of the school’s goals & performance targets & current status. The Guild representatives will evaluate academic & program goal achievement.			
Annual school---wide academic achievement goals address state & federal accountability expectations in mathematics & reading (e.g., MCA---II/MTELL /MTAS, TEAE/MN SOLOM) & establish rigorous, attainable increases in student achievement from the prior year.			
Yes	No	Unclear	
Comments:			
Annual student achievement in mathematics & reading shows regular & consistent increases in student performance with rates of change equal to or greater than other entities such as the state, the nation, or regional schools with similar demographics.			
Yes	No	Unclear	
Comments:			

Reported growth measures of student achievement in mathematics & reading indicate students performing on grade level are making at least 1 year's expected growth when receiving 1 year of opportunity to learn & struggling students are making accelerated growth when receiving 1 year of opportunity to learn.		
Yes	No	Unclear
Comments:		
Additional annual school---wide goals address other aspects of student learning (i.e. content areas not mathematics or reading --- critical thinking, problem solving, 21 <sup>st</sup> Century skills, personal responsibility, etc.) related to the school's mission, if appropriate & establish rigorous, attainable increases from previous year.		
Yes	No	Unclear
Comments:		
Other school performance goals will address state and federal accountability targets for student attendance, and for graduation rates if applicable		
Yes	No	Unclear
Comments:		
Overall/general comments:		
<b>School Climate &amp; Satisfaction Performance Indicators</b>		
The annual site visit should include review of student retention data, the most recent data on stakeholder satisfaction & perceptions of safety by stakeholders.		
Student retention rates show improvement over time for all student groups enrolled in the school.		
Yes	No	Unclear
Comments:		
Perception measures of satisfaction (e.g. surveys, focus groups, etc) indicate a positive learning environment for all students from the perspective of multiple stakeholders including students, parents & community members.		
Yes	No	Unclear
Comments:		
Perception measures of safety (e.g. surveys, focus groups, etc.) indicate students and parent perceive the school environment as safe for all student groups.		
Yes	No	Unclear

Overall/general comments:

**Operational Performance Indicators**

The Annual Site Visit should include an interview with the Board chair or another Board member(s). Documentation addressing Operational Performance Indicators should be prepared by the school in advance for ease of review during the site visit.

The Charter School Board is organized consistent with state law & follows good governance practices including:

- No conflicts of interest for any members
- Compliance with the Minnesota open meeting law
- Follows own by-laws
- Adopts required policies
- Develops a strategic plan (optional)

Yes	No	Unclear
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Comments:

The Board meetings are conducted following parliamentary procedure including a published agenda, minutes of previous meetings, and a defined meeting process.

Yes	No	Unclear
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Comments:

The Board makes key school decisions including:

- Setting policies of the school
- Setting performance expectations consistent with the contract with the authorizer
- Adopting an annual budget and monitoring/reviewing the budget regularly
- Approving all expenditures
- Reviewing and accepting the annual audit
- Reviewing school academic performance regularly
- Reviewing the annual report
- Adopting an educational improvement plan (could be a School Improvement Plan, or included in a strategic plan)
- Reviewing the performance of the school's lead administrator at least annually

Yes	No	Unclear
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Comments:

The Board has a "board development plan" including annual training.

Yes	No	Unclear
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Comments:

<p>Appropriate management by school leadership are reflected in a variety of summary data including:</p> <ul style="list-style-type: none"> <li>--- Staff qualifications/licensure compliant with state requirements</li> <li>--- Staff selection process fair and appropriate</li> <li>--- Staff assignments and turnover reasonable</li> <li>--- Enrollment process implemented with fidelity and projections are reasonable</li> <li>--- Transportation system functioning well</li> <li>--- Established Complaint and resolution procedures implemented with fidelity when necessary</li> <li>--- State reporting completed accurately and timely</li> <li>--- Board policies implemented</li> <li>--- Appropriate insurance acquired and maintained</li> </ul>		
Yes	No	Unclear
<p>Comments:</p> <p>The school complies with state and federal standards for civil rights, health/safety/welfare, special education, English Language Learners, discipline, food/nutrition, student performance accountability, and audits including:</p> <ul style="list-style-type: none"> <li>--- Non-discrimination laws followed</li> <li>--- Health and safety laws adhered to</li> <li>--- State testing and accountability requirements implemented with fidelity</li> <li>--- Special populations such as students with disabilities and English Language Learners, appropriately served</li> </ul>		
Yes	No	Unclear
<p>Comments:</p> <p>Teacher evaluation and leadership evaluation indicates strong focus on improving instruction.</p>		
Yes	No	Unclear
<p>Comments:</p> <p>Facilities are appropriate and adequate including:</p> <ul style="list-style-type: none"> <li>--- The school has adequate space</li> <li>--- The lease provisions implemented</li> </ul>		
Yes	No	Unclear
<p>Comments:</p> <p><b>Finance Performance Indicators</b></p>		
<p>The Annual Site Visit should include an interview with the school's business manager, Board treasurer or other individual knowledgeable about the school's</p>		
<p>finances. Documentation addressing Finance Performance Indicators should be prepared by the school in advance for ease of review during the site visit.</p>		

The school has a budget approved by its Board; the budget is being followed or amended when necessary based on student enrollment changes or other appropriate reasons.		
Yes	No	Unclear
Comments:		
The school finances are appropriately managed as evidenced by the audit and monthly reports.		
Yes	No	Unclear
Comments:		
State finance reports are filed appropriately and on time.		
Yes	No	Unclear
Comments:		
State/federal taxes, pensions, insurance, etc. are paid as required.		
Yes	No	Unclear
Comments:		
The budget includes revenue for anticipated future needs, i.e. a reserve fund.		
Yes	No	Unclear
Comments:		
The patterns of expenditures are consistent with the mission, program and goals of the school.		
Yes	No	Unclear
Comments:		
The school audit contains no material findings.		
Yes	No	Unclear
Comments:		
Overall/general comments:		
Filed by (Print Name):		Date:

# Application for Charter Contract Renewal

Charter schools authorized by the Minnesota Guild of Public Charter Schools (the Guild) may apply to renew their contracts by submit an application at least 120 days prior to the end of the current contract term.

School Name	Contact/Title	Phone	Current Contract Dates
Address		E---mail	
<b>Evaluation of School/Student Performance</b>			
Program Model Performance Indicators		Achieved/Progress	
Program model is consistent with application and statutory descriptions			
Parents, staff, board & students have a clear understanding of the program model & mission of the school			
Curriculum supports the school mission & program model, is aligned to the Minnesota Academic Standards & is implemented			
Professional development supports the mission, the program model, and continuous school improvement			
<b>Summary</b>			
School---wide Educational Performance Indicators		Achieved/Progress	
Annual school---wide academic achievement goals address state & federal accountability expectations in mathematics & reading (e.g., MCA--- II/MTELL/MTAS, TEAE/MN SOLOM) & establish rigorous, attainable increases in student achievement from previous year			
Annual results of student achievement in mathematics & reading show regular & consistent increases in student performance with rates of change equal to or greater than other entities such as the state, the nation, or regional schools with similar demographics			
Reported growth measures of student achievement in mathematics & reading indicate students performing on grade level are making at least 1 year's expected growth when receiving one year of opportunity to learn & struggling students make accelerated growth when receiving 1 year of opportunity to learn			
Additional annual school---wide goals address other aspects of student learning (i.e. content areas not mathematics or reading --- critical thinking, problem solving, 21 <sup>st</sup> Century skills, personal responsibility, etc.) related to the school's			

mission, if appropriate, & establish rigorous, attainable increases from prior year	
Other school performance goals address state & federal accountability targets for student attendance, & for graduation rates if applicable	
<b>Summary</b>	
School Climate and Satisfaction Performance Indicators	Achieved/Progress
Student retention rates show improvement over time for all student groups	
Perception measures of satisfaction (e.g. surveys, focus groups, etc) indicate a positive learning environment for all students from the perspective of multiple stakeholders including students, parents & community members	
Perception measures of safety (e.g. surveys, focus groups, etc.) indicate students & parents perceive the school environment as safe for all students	
<b>Summary</b>	
Operational Performance Indicators	Achieved/Progress
Charter School Board is organized consistent with state law	
No conflicts of interest for any members	
Compliance with the Minnesota open meeting law	
Follows own by--laws	
Adopts required policies	
Develops a strategic plan (optional)	
Board meetings are conducted following parliamentary procedure including a published agenda, minutes of previous meetings & a defined meeting process	
The Board sets policies of the school	
The Board sets performance expectations consistent with authorizer contract	
The Board adopts an annual budget & monitors/reviews the budget regularly	
The Board approves all expenditures	
The Board reviews & accepts the annual audit	
The Board reviews school academic performance regularly	
The Board reviews the annual report	
The Board adopts improvement plans (School Improvement Plan or strategic)	
The Board reviews the performance of the school's leader at least annually	
The Board has a "board development plan" including annual training	
Professional staff qualifications/licensure compliant with state requirements	
Staff selection process fair and appropriate	
Staff assignments & turnover are reasonable	
Enrollment process implemented with fidelity & projections are reasonable	
Transportation system functions well	

Established complaint & resolution procedures implemented	
State reporting completed accurately & on time	
Board policies implemented	
Appropriate insurance acquired & maintained	
School complies with state & federal standards for civil rights, health/safety/welfare, special education, English Language Learners, discipline, food/nutrition, student performance accountability	
Audits: Non-discrimination laws followed	
Audits: Health and safety laws compliant	
State testing & accountability requirements implemented	
Special populations such as students with disabilities & English Language Learners appropriately served	
Teacher/leadership evaluation indicates strong focus on improving instruction	
Facilities are appropriate & adequate including space & lease provisions implemented	
<b>Summary</b>	
<b>Finance Performance Indicators</b>	<b>Achieved/Progress</b>
Budget is approved by the Board; followed or amended when necessary based on student enrollment changes or other appropriate reasons	
School finances are appropriately managed as evidenced by the audit & monthly reports	
State finance reports are filed appropriately & on time	
State/federal taxes, pensions, insurance, etc. are paid as required	
Budget includes revenue for anticipated future needs, i.e. a reserve fund	
Expenditures are consistent with the mission, program & goals of the school	
Audit contains no material findings	
<b>Summary</b>	