



## MEMORANDUM

TO: Charter School Renewal Applicants  
FROM: Thomas B. Fordham Foundation (Sponsorship)  
DATE: June 15, 2014  
RE: Charter Renewal Process  
Action item: Please review.

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### **Introduction**

The purpose of this memo is to provide information on the Thomas B. Fordham Foundation's charter renewal process.

### **Factors Considered**

Renewal of a school's sponsorship contract (i.e., charter) is based on several factors, including but not limited to the following.

- 1) **Past performance:** Performance against the school's Academic and Organizational Accountability Plan (Exhibit IV, Sponsorship Contract). Each school's plan contains a series of academic, financial, operational and organizational metrics by which school performance is measured.
- 2) **Site Visits:** Ohio law requires that sponsors conduct at least two on-site visits each school year while classes are in session and one site visit prior to the start of each school year. The Thomas B. Fordham Foundation conducts fall and spring site visits, while classes are in session. The purpose of the visits is to evaluate whether the school is implementing the model as set forth in the school's sponsorship contract, and check compliance requirements. A written report of the visit is issued to each school leader and to the school's board upon completion. The purpose of the reports is to provide the school's governing authority, the Ohio Department of Education, and the public with the results of those visits. The reports examine the implementation of the education, financial, and governance plans, and most importantly, academic performance.

- 3) **Compliance Information:** Charter schools must meet local, state, federal and contractual compliance requirements. The Thomas B. Fordham Foundation utilizes an online document management and archiving system, Epicenter, to monitor each school's compliance status. Results of individual school compliance are published in Fordham's annual sponsorship accountability report and are publicly available via Fordham's website.
- 4) **Finance:** The financial viability of a community school is assessed by examining the monthly financial statements submitted by the community school and its treasurer to the sponsor, required annual state audits, and the school's enrollment trends. Individual school finances are examined monthly, and information is entered into a financial dashboard that assists in monitoring each school's financial health.
- 5) **Governance and Operations:** The Thomas B. Fordham Foundation also assesses governance and operational health, including issues such as conflict of interest, open meeting, and other requirements specific to charter school boards of directors.
- 6) **Renewal Application:** Effective June 15, 2014, any school with a contract for two or more years must submit a renewal application via Fordham's online application management system, Epicenter. The purpose of this step is to ensure that any changes to the school's model have an opportunity to be reviewed and evaluated by the Fordham Foundation. Access information is available from Fordham staff.

### **Process**

The above information is reviewed by Fordham staff. Staff then makes a recommendation on renewal or non-renewal to a committee of the Fordham Foundation's board. The committee discusses the merits of the recommendation, and makes recommendations to the Fordham Foundations board of directors. If the Fordham Foundation's board of directors approves the renewal, a renewal contract is drafted and executed.

### **Timing**

<b>Date</b>	<b>Task</b>
October 1 – November 30, 2014	School submits renewal application via Epicenter
December 1 -30, 2014	Fordham staff review renewal application and information listed above
January 1 – February 28, 2015	Staff makes recommendations to board committee, board decisions on renewals
By February 1, 2015	Intent to non-renew notice issued if a school may not receive a contract renewal
By March 15, 2015	Schools notified of renewal decisions

March 16 – April 30	Contracts drafted
May 1 – May 30	Contract review by both parties
By June 30	Contracts submitted to Ohio Department of Education

### **Questions**

Please contact Miles Caunin, at [mcaunin@edexcellence.net](mailto:mcaunin@edexcellence.net) or 937-227-3368, with questions or requests for additional information.