Charter School Development Final Report

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Introduction

Today in Colorado, there are 255 charter schools enrolling over 124,000 students, for 14% of the total public school enrollment in Colorado.[1] However, there are several significant challenges for Colorado charter schools currently operating and those looking to open, replicate, or expand their school. First, the enrollment growth of Colorado's student population has slowed significantly. In 2018-19, the state only added 1,256 students for a growth rate of 0.1%, the slowest rate of growth in 30 years.[2] Denver Public Schools only added around 200 additional students, while other districts in the Denver metro area, such as Jefferson County and Aurora Public Schools, saw a decrease in the total number of students enrolled in charter schools by over 1,000 students.[3] This slow-down in growth has led to increased competition for student enrollment in districts experiencing enrollment declines or stagnation and has prevented additional charter schools from opening as quickly as they would like to.

In addition to student enrollment challenges, there are also barriers associated with finding a facility and authorization. Housing prices in the Denver metropolitan area have risen faster than the national average, leading to a scarcity in available facilities for charter schools looking to open or expand. This facility shortage has created a significant barrier for charter schools, and many charter schools need to delay their opening due to an inability to secure an appropriate facility. Additionally, the political climate in Colorado is shifting in several major cities, leading to some authorizers taking a less supportive position of charter schools, and thus a decrease in their desire to have additional charter schools in the district. These districts may be less likely to approve a charter application.

Although for the last 25 years Colorado has seen an increase in the number of charter schools that open each year of equating to an average growth rate of 6%, last year the growth rate was only 2%, with only five new charter schools opening compared to an average of 10-15 historically.[4] To help identify the challenges associated with opening, replicating, and expanding charter schools in Colorado, as well as identify best practices to help support new school developers, the Colorado Department of Education (CDE) commissioned this study. CDE won a grant from the federal Charter School Program (CSP) that is intended, in part, to help schools strengthen their practices and inform the development of technical assistance services and resources for new school developers. The information from this study will help CDE develop corresponding guidance and resources that will enable additional high-quality charter schools to open in Colorado.

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[1] Colorado Department of Education. (2019). 2018-2019 Pupil Membership. https://www.cde.state.co.us/cdereval/pupilcurrent

[2] The Associated Press. (2019). Colorado Public Enrollment Exceeds 911,000 Statewide. *The Coloradan.* https://www.coloradoan.com/story/news/local/colorado/2019/01/25/colorado-public-school-enrollment-exceeds-911-000-statewide/2678611002/

[3] Colorado Department of Education. (2019). 2018-2019 Pupil Membership. https://www.cde.state.co.us/cdereval/pupilcurrent

[4] Colorado League of Charter Schools. (2019). Charter Enrollment & Market Share (PK-12). Internal documentation.

Methodology

This study used a review of existing statewide and national research as well as a survey of charter school developers, operators, and authorizers to gather data on the needs, challenges, and best practices from charter schools, charter school developers, and authorizers on the opening, expansion, and replication of charter schools.

The review of prior research encompassed both national and statewide sources. For this study, we used the following inclusion criteria for the review of existing research: 1) the study must be written in English, 2) the study must be conducted in the United States, 3) the study must address charter school development, replication, or expansion, and 4) the study must have been published between 2000 and 2019. Over 20 research studies were identified that examined the challenges of opening, expanding, and replicating a school, as well as best practices for new school developers.

Two surveys were developed to gather data on the needs, challenges, and best practices of opening, expanding, and replicating a charter school in Colorado. One survey was sent to all current Colorado charter school operators, as well as charter school developers who are currently in the process of developing or opening their school. 41 charter school developers completed the survey. Of those 41 charter school developers, 21 were located in urban communities, 14 were located in suburban communities, and 6 were located in rural communities. The second survey was sent to representatives at each school district that currently authorizes charter schools, including superintendents, assistant superintendents, and charter liaisons. This survey received 17 responses.

Summary of Findings

Review of Research: Opening a School

A review of existing research revealed that new school developers opening a school can struggle with aspects of school design, backoffice support, and financing. For some new school developers, moving from the school design phase of opening a charter school to the implementation phase can be challenging. Some new school developers can find that it easier to describe their school than to go through the process of opening a school, which includes finding backoffice support.[5] Charter schools can often struggle with implementing backoffice operations necessary to run their school after they have moved out of the design phase. Charter schools are responsible for putting the infrastructures in place for items such as insurance, payroll, and student information management, which requires specialized knowledge and skillsets that founding teams may not initially have.[6] Finally, in a case study of three charter schools in Colorado, new school developers faced significant financial challenges related to facilities.[7] These charter schools struggled with finding an adequate and affordable facility in a high-cost real estate market.[8]

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[5] Harvey, J. & Rainey, L. (2006). *High-Quality Charter Schools at Scale in Big Cities: Results of a Symposium*. Seattle, WA: National Charter School Research Project and Center on Reinventing Public Education.

[6] Cevallos, P.F. (2009). *A Case Study with Green Dot Public Schools on Managing the Tension Between Fidelity and Adaptation When Scaling-Up*. Dissertation presented to the University of California Los Angeles.

[7] Izard, R. (2017). *The Challenges of Opening a Charter School: Three Colorado Case Studies*. Denver, CO: Independence Institute.

[8] Izard, R. (2017). *The Challenges of Opening a Charter School: Three Colorado Case Studies*. Denver, CO: Independence Institute.

Additionally, prior research indicated that another significant barrier facing new charter schools is finding school leaders to lead the school. Charter schools can often face perceptions that charter school leaders' workloads are higher and the salaries are less than in a traditional public school.[9] Furthermore, many high-quality school leaders may already work in a charter school, and they may not be interested in opening a new school.[10] Research indicates that school leaders of new schools may also require up to two years of planning in order to successfully open a charter school, which requires significant financial support that new schools may not have.[11] To address challenges with finding school leaders, research recommends creating leadership pipeline programs within the school or conducting succession planning. Specifically, creating assistant principal or dean positions earlier in a school's operation can ensure there are leaders in place who can fill the position in the event of leadership turnover or can be called upon to open a new school.[12] Additionally, successor principals should be identified at least 18 months in advance, if possible, to ensure a smooth transition and allow the gradual transfer of responsibilities.[13]

Rural schools can face more challenges than schools located in an urban or suburban area because of their geographic location. Rural schools have more difficulty with staffing and have difficulty recruiting teachers and principals to work in more remote locations.[14] Additionally, rural schools may not be able to offer salaries that are competitive with those of urban and suburban schools.[15] Furthermore, rural schools can struggle with board recruitment, community support, and authorizer capacity based on their remote location.[16] To combat the challenges with geographic isolation, research suggested several best practices for rural schools. In the design phase, rural charter schools can design academic programs that integrate their community in unique ways.[17] Rural charter schools can arrange partnerships with local businesses or community organizations that can increase the resources of the school and support the school's instruction.[18] To overcome geographic isolation, rural schools can also use technology, such as e-learning tools, to help supplement the school's curriculum if the school cannot afford to hire a full-time staff member for the position.[19] There are also several federal programs that

[9] Knechtel, V., Anderson, M.A., Burnett, A., Coen, T., Sullivan, M., Tuttle, C., & Gleason, P. (2015*). Understanding the Effect of KIPP as it Scales*. Washington, DC: Mathematica Policy Research.

[10] Trusty, B. (2017). *Pathways to Success: Providing More Children Access to Great Public Schools*. Education Cities.

[11] Trusty, B. (2017). *Pathways to Success: Providing More Children Access to Great Public Schools*. Education Cities.

[12] Knechtel, V., Anderson, M.A., Burnett, A., Coen, T., Sullivan, M., Tuttle, C., & Gleason, P. (2015*). Understanding the Effect of KIPP as it Scales*. Washington, DC: Mathematica Policy Research.

[13] Knechtel, V., Anderson, M.A., Burnett, A., Coen, T., Sullivan, M., Tuttle, C., & Gleason, P. (2015*). Understanding the Effect of KIPP as it Scales*. Washington, DC: Mathematica Policy Research.

[14] Stuit, D. & Doan, S. (2012). *Beyond City Limits: Expanding Public Charter Schools in Rural America*. Washington, DC: National Alliance for Public Charter Schools.

[15] Stuit, D. & Doan, S. (2012). *Beyond City Limits: Expanding Public Charter Schools in Rural America*. Washington, DC: National Alliance for Public Charter Schools.

[16] Stuit, D. & Doan, S. (2012). *Beyond City Limits: Expanding Public Charter Schools in Rural America*. Washington, DC: National Alliance for Public Charter Schools.

[17] Stuit, D. & Doan, S. (2012). *Beyond City Limits: Expanding Public Charter Schools in Rural America*. Washington, DC: National Alliance for Public Charter Schools.

[18] Stuit, D. & Doan, S. (2012). *Beyond City Limits: Expanding Public Charter Schools in Rural America*. Washington, DC: National Alliance for Public Charter Schools.

[19] Stuit, D. & Doan, S. (2012). *Beyond City Limits: Expanding Public Charter Schools in Rural America*. Washington, DC: National Alliance for Public Charter Schools.

allocate funds for rural development that charter schools can take advantage of, including the U.S. Department of Agriculture Rural Development Program and the Quality Opportunity Zones program.[20]

Review of Research: Expansion and Replication

There are several challenges that charter school operators face when they are seeking to expand or replicate. One study found there were two main barriers to expansion and replication: a lack of school operators that want to grow their school and the ability to manage organizational complexity as they grow.[21] Another challenge is that the original school model may not work in a new context. Schools need to balance fidelity to their model with the necessary adaptation to a different student population and context.[22] Without this balance, the replicated charter school may not have the same quality as the original school model.[23] One case study found that charter schools were the most successful with expansion and replication when they replicated an already-successful single-site model until they reached an economy of scale.[24]

Additionally, expansion requires start-up costs that an operating school would need to absorb. In expansion, schools must balance operating an existing school while planning to open another school, which can be complex and challenging.[25] One study found that CMO networks can run deficits of up to $1.5 million annually as a campus expands to full enrollment.[26] Another financial challenge is finding appropriate facilities at an affordable cost.[27] Charter schools must use operating funds to cover the costs of additional facilities.[28] In Colorado, a recent study found that 65% of charter schools planned to increase their enrollment over the next five years, but 44% did not have the space to accommodate that increased enrollment.[29] Access to affordable facilities also prevents growth opportunities for charter schools seeking to expand or replicate.[30]

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[20] Medler, A., Beckett, L., Mohr, D., Griffin, J., and Hamadani, A. (2018). Charter School Facilities Financing Sources: Exploring Quality Opportunity Zones and the U.S. Department of Agriculture Rural Development Programs.

[21] Trusty, B. (2017). *Pathways to Success: Providing More Children Access to Great Public Schools*. Education Cities.

[22] Cevallos, P.F. (2009). *A Case Study with Green Dot Public Schools on Managing the Tension Between Fidelity and Adaptation When Scaling-Up*. Dissertation presented to the University of California Los Angeles.

[23] Lake, R. (2007). *Identifying and Replicating the "DNA" of Successful Charter Schools: Lessons from the Private Sector*. Seattle, WA: Center of Reinventing Public Education.

[24] Cevallos, P.F. (2009). *A Case Study with Green Dot Public Schools on Managing the Tension Between Fidelity and Adaptation When Scaling-Up*. Dissertation presented to the University of California Los Angeles.

[25] Peltason, E.H. & Raymond, M.E. (2013). *Charter School Growth and Replication*. Stanford, CA: Center for Research on Education Outcomes.

[26] National Alliance for Public Charter Schools. (2016). *How to Recruit High-Performing Charter Management Organizations to a New Region: Results from the 2015 CMO Survey*. Washington, DC: National Alliance for Public Charter Schools

[27] National Alliance for Public Charter Schools. (2016). *How to Recruit High-Performing Charter Management Organizations to a New Region: Results from the 2015 CMO Survey*. Washington, DC: National Alliance for Public Charter Schools

[28] Cevallos, P.F. (2009). *A Case Study with Green Dot Public Schools on Managing the Tension Between Fidelity and Adaptation When Scaling-Up*. Dissertation presented to the University of California Los Angeles.

[29] Lindquist, B., Hesla, K., Schaller, D., & Beckett, L. (2018). An Analysis of the Charter School Landscape in Colorado. http://facilitiesinitiative.org/media/1268/csfi_colorado.pdf

[30] Berman, I. (2009). *Achieving Excellence at Scale: State Support for High-Performing Charter School Expansion*. Washington, DC: NGA Center for Best Practices.

Lastly, local policy may also present a challenge to operators looking to expand or replicate.[31] Some states have charter school caps which prevent the growth of high-performing charter schools.[32] Local school board elections can also change a district's receptivity to new charter schools. Even districts that were traditionally supportive of charter schools can change their stance in a single school board election.[33] Several articles contained specific guidance for policymakers seeking to increase the number of high-quality charter schools. One resource recommended streamlining the reporting, renewal, and governance requirement for high-performing charter schools seeking to expand.[34] States can also create policies around charter school access to facilities or equitable funding for charter schools.[35] Additionally, states can remove charter caps in any state charter laws and provide incentives for replication or expansion.[36]

In order to determine whether expansion or replication is worth the effort regarding impact and financial investment, there are several guidelines that CMOs use that could be adapted for new school developers in Colorado.[37] Some CMOs will spend time assessing the market where they are interested in expanding to, including identifying the need, available resources, governance structures of the market, and human capital.[38] Other CMOs will focus on identifying locations with strong statutes and strong authorizers, turnaround opportunities, average per-pupil funding, and the competition or market saturation of an area in order to make decisions about their expansion or replication.[39] One study found that human capital is vital to CMO expansion, and CMOs will assess the human capital pipeline in a new market before making the decision to expand or replicate.[40]

[31] Public Impact (2011).

[32] Berman, I. (2009). *Achieving Excellence at Scale: State Support for High-Performing Charter School Expansion*. Washington, DC: NGA Center for Best Practices.

[33] Harvey, J. & Rainey, L. (2006). *High-Quality Charter Schools at Scale in Big Cities: Results of a Symposium*. Seattle, WA: National Charter School Research Project and Center on Reinventing Public Education.

[34] Berman, I. (2009). *Achieving Excellence at Scale: State Support for High-Performing Charter School Expansion*. Washington, DC: NGA Center for Best Practices.

[35] Berman, I. (2009). *Achieving Excellence at Scale: State Support for High-Performing Charter School Expansion*. Washington, DC: NGA Center for Best Practices.

[36] National Association of Charter School Authorizers. (2009). *Charter School Replication*. Chicago, IL: National Association of Charter School Authorizers.

[37] National Alliance for Public Charter Schools. (2016). *How to Recruit High-Performing Charter Management Organizations to a New Region: Results from the 2015 CMO Survey*. Washington, DC: National Alliance for Public Charter Schools.

[38] National Alliance for Public Charter Schools. (2016). *How to Recruit High-Performing Charter Management Organizations to a New Region: Results from the 2015 CMO Survey*. Washington, DC: National Alliance for Public Charter Schools.

[39] Democracy Prep Public Schools, Green Dot Public Schools, Rocketship Public Schools & Low Income Investment Fund. (2018*). Exploring CMO Geographic Expansion: National Trends and Local Case Studies.* Presented at the annual National Alliance for Public Charter Schools conference in Austin, TX.

[40] National Alliance for Public Charter Schools. (2016). *How to Recruit High-Performing Charter Management Organizations to a New Region: Results from the 2015 CMO Survey*. Washington, DC: National Alliance for Public Charter Schools.

Survey Results: Opening a School

Challenges in Opening a School

The survey results from charter school operators and district authorizers revealed several themes about the challenges with opening a school:

- Authorization process and relationships
- Finding and funding a facility
- Start-up funding
- Staffing
- Enrollment and community engagement
- Setting up backoffice operations
- Local politics
- Board governance

There were several challenges that new charter school developers reported facing in the survey. The largest challenge was related to funding or fundraising. 63% of charter school developers reported that acquiring the start-up funding or fundraising needed to open a new school was a significant challenge. While charter schools can apply for CDE's CSP grant (funding that can be used for expenses associated with planning, designing, and implementing a new school or an expansion of a school), this funding is awarded through a sub-grant competition, and not every charter school that is in the process of opening will win this award.[41] 79% of respondents indicated they would have liked to receive over $100K in additional start-up funding than what they actually received. Respondents have received start-up funds from a variety of sources including private foundations (56%), CDE's CSP grant (50%), and private donors, such as parents or community members (50%), but they are still seeking additional funding.

The next largest challenges facing charter school developers trying to open a school were related to facilities. 58% of respondents indicated that finding a facility and the expense of the facility were barriers to opening their schools. In open-ended responses, respondents articulated that finding an affordable space was particularly challenging given the current real estate market and that it can be challenging to concurrently secure facility financing and find a property to lease. One respondent indicated that they were able to identity a facility to lease but did not have facility financing secured, which resulted in the facility being occupied by the time their financing was in place. Another respondent mentioned that there is an increased cost associated with acquiring a facility that is not already operating as a school, due to the capital improvements needed to make the space useable for instruction. A recent study conducted by the Colorado League of Charter Schools on the facility landscape in Colorado found that charter schools in Colorado spent an average of $725 per pupil on their facility, but this amount varied depending on the ownership of the building.[42] Furthermore, since

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[41] Colorado Department of Education (2019). Colorado Charter Schools Program. https://www.cde.state.co.us/cdechart/grantprograms
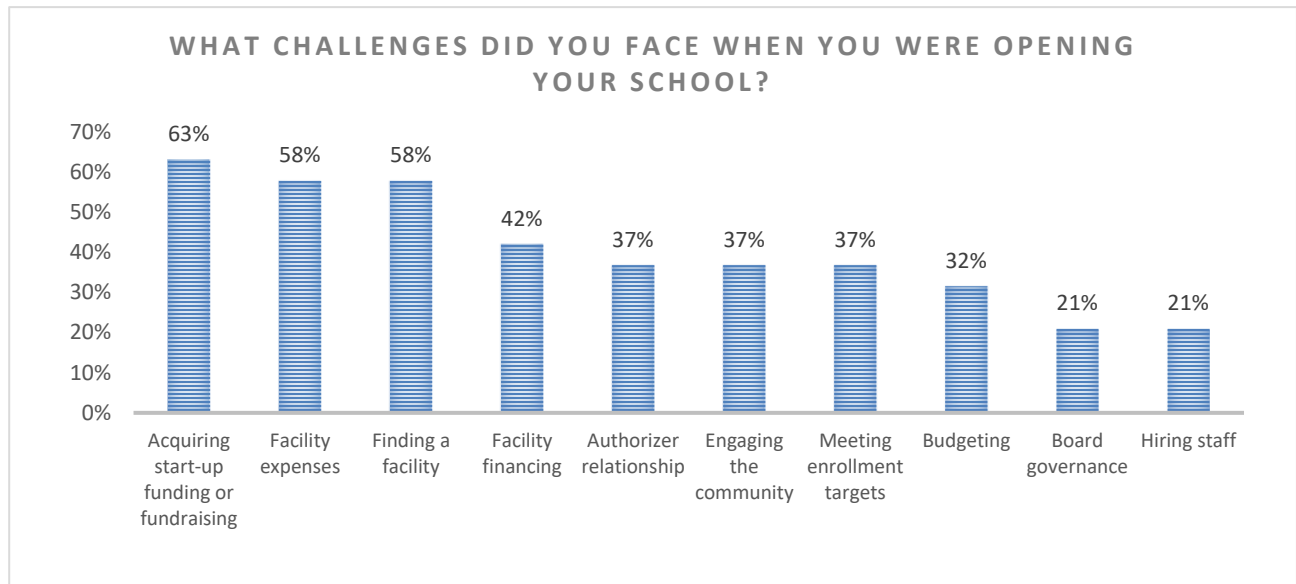
[42] Lindquist, B., Hesla, K., Schaller, D., & Beckett, L. (2018). An Analysis of the Charter School Landscape in Colorado. http://facilitiesinitiative.org/media/1268/csfi_colorado.pdf

2007, the average facilities expenditures in Colorado have increased approximately 4.7%, and state facility funding has not kept pace with the rising real estate costs.[43]

Figure 1 displays all of the challenges that new school developers reported facing and the percentage of respondents who experienced each challenge.

Figure 1. Challenges in Opening a School Survey Responses

WHAT CHALLENGES DID YOU FACE WHEN YOU WERE OPENING YOUR SCHOOL?

Challenge	Percentage
Acquiring start-up funding or fundraising	63%
Facility expenses	58%
Finding a facility	58%
Facility financing	42%
Authorizer relationship	37%
Engaging the community	37%
Meeting enrollment targets	37%
Budgeting	32%
Board governance	21%
Hiring staff	21%

When the challenges were broken down into whether a school was located in an urban, suburban, or rural location, there were some differences in the top challenges that schools faced. For schools in an urban area, the top three challenges were acquiring start-up funding or fundraising (48%), finding a facility (38%), and facility expenses (33%). For schools in suburban locations, the top three challenges were the authorizer relationship (29%), finding a facility (29%), and facility expenses (29%). For schools in a rural setting, the top challenge was budgeting (83%).

In addition to charter school developers, district authorizers were also surveyed on their perspectives related to challenges facing new charter schools. The top three challenges that districts reported new charter schools faced in their district were board governance, meeting enrollment targets, and acquiring start-up funding or fundraising. Districts reported that schools struggled the least with building a balanced design team, facility expenses, and facility financing.

Best Practices for Opening A School

In the survey, new school developers and district authorizers provided recommendations and best practices for opening a new school. The advice fell into three main categories: application and planning, funding, and operations.

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[43] Lindquist, B., Hesla, K., Schaller, D., & Beckett, L. (2018). An Analysis of the Charter School Landscape in Colorado. http://facilitiesinitiative.org/media/1268/csfi_colorado.pdf

Application & Planning

- Begin the planning process as early as possible and allow adequate time for developing your school design.
- Conduct research on the market in your community and know what the niche for your school will be.
- Be able to explain your model concisely and articulate why your school is needed.
- Visit other schools with similar models to learn about their challenges and what has worked.
- Engage with the community your school will be in early in the planning process and keep the families engaged throughout the entire process.

Funding

- Begin building relationships with funders before your school application is approved by the authorizer; have initial conversations as early as possible.
- Prioritize raising money for your school initially, and once that is secured, then move on to other aspects of school design.
- Allocate adequate time to pursue funding opportunities.
- Understand the costs associated with facilities and how much of the budget will be allocated toward facilities expenses or construction.
- Plan on using a portion of funding to pay for consultants or contractors to help in key areas as you develop your school design.

Operations

- Spend time on building operational systems in year 0.
- Be transparent with staff during the hiring process on the additional duties required of a start-up school in year 1.
- Do not start a parent-teacher organization until your staff has built relationships with one another.
- Ensure that you have someone on staff who understands student information systems.
- Find mentors for all aspects of operating your school including HR, school finance, enrollment, and backoffice. Visit schools during year 0 that are doing these practices well to learn from them.

Enrollment

One of the challenges that schools face when they are opening their school is meeting their enrollment targets. Being unable to meet enrollment targets can delay the opening of a school or impact the project revenue for the school if the number of students who enroll is below the target. Of the respondents for the survey, 80% indicated they were able to meet their enrollment targets when opening their school. These respondents reported using following community and involvement outreach strategies:

- Create a comprehensive marketing plan and allocate funding to implement the plan.
- Create an enrollment steering committee comprised of community members to help build relationships with the community.
- Use engaged families as recruiters at community events and relationships with community partners to attend community events.
- Hold fun, family-friendly events, such as an Easter Egg Hunt, summer carnivals, or BBQs.
- Routinely distribute press releases and foster favorable local media coverage.

- Have a large social media presence, including a Facebook page, with targeted communication to mother and family groups.
- Set up tables with information at local libraries, grocery stores, and community events.
- Hold one-on-one meetings with prospective families and conduct home visits.
- Engage in door-knocking and flyer-ing in the community; use word-of-mouth.
- Send direct mailings to homes in nearby neighborhoods.
- Run radio ads, online ads, and newspaper ads.
- Conduct social media campaigns on Facebook and Nextdoor.
- Attend district enrollment events.

For schools that were unable to meet their enrollment targets, barriers cited included facilities being located in religious buildings that made potential families uncomfortable, trying to meet enrollment targets without a social media presence, and not being able to provide childcare or transportation for families.

In addition to asking about challenges and best practices in meeting enrollment targets, the survey also asked about strategies used to increase enrollment. Respondents who have been able to increase their enrollment since their school has been open have utilized the following strategies:
- Use current families as advocates to talk to other families about the school.
- Use current students to talk to other students about the school.
- Use press releases and local media coverage to highlight student work in the community.
- Distribute an email newsletter with updates about the school.
- Highlight student achievement results through word of mouth and social media.
- Hold community outreach opportunities, including classes for parents and community events.

In the survey of district authorizers, they were asked to rate the utility of different data sources when estimating the projected enrollment of a new or expanding school. District authorizers ranked the data as follows, with 1 being the highest-ranked data source: 1) intent to enroll forms, 2) participation in community meetings, 3) letters of support, 4) social media data, and 5) petitions.

Survey Results: Expansion and Replication

Challenges with Expansion and Replication

The survey results from charter school operators and district authorizers revealed several themes about the challenges with expansion and replication:

- Local landscape of declining enrollment and facility costs
- Maintaining current operations is already difficult
- Authorizer process and relationship
- Finding facilities

Of the respondents who completed the survey, 41% indicated that their school planned for expansion or replication. Respondents indicated that when they were planning for expansion or replication, it took an average of 2-3 years before the expansion or replication occurred. Respondents who did not plan for expansion or replication indicated several barriers that prevented expansion or replication: 1) local landscape of declining enrollment and facility costs, 2) difficulty finding a facility, 3)

maintaining current operations is already difficult, 4) negative authorizer relationship or difficult authorization process, and 5) no desire to expand or replicate at this time.

Best Practices for Expansion and Replication

Respondents who planned for expansion or replication considered several factors in order to determine if their school was ready for expansion or replication. The top factor considered was the overall financial health of the school (67%) followed by current student enrollment (50%) and current student achievement (50%). The complete list of factors that schools considered is shown below in Figure 2.

Figure 2. Factors for Determining Readiness for Replication or Expansion
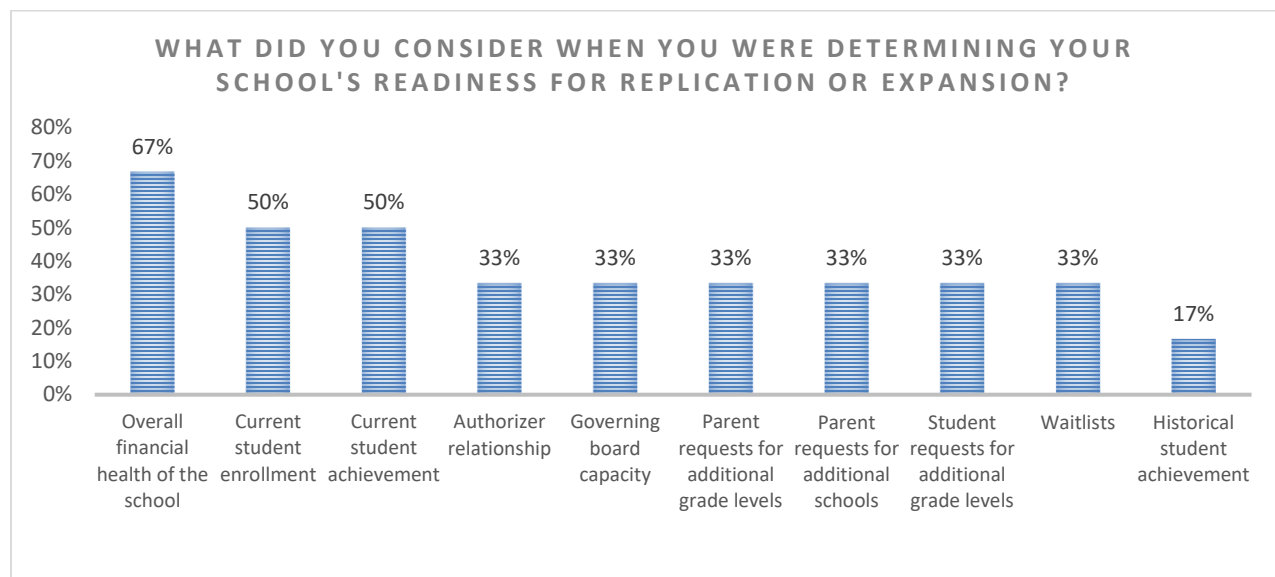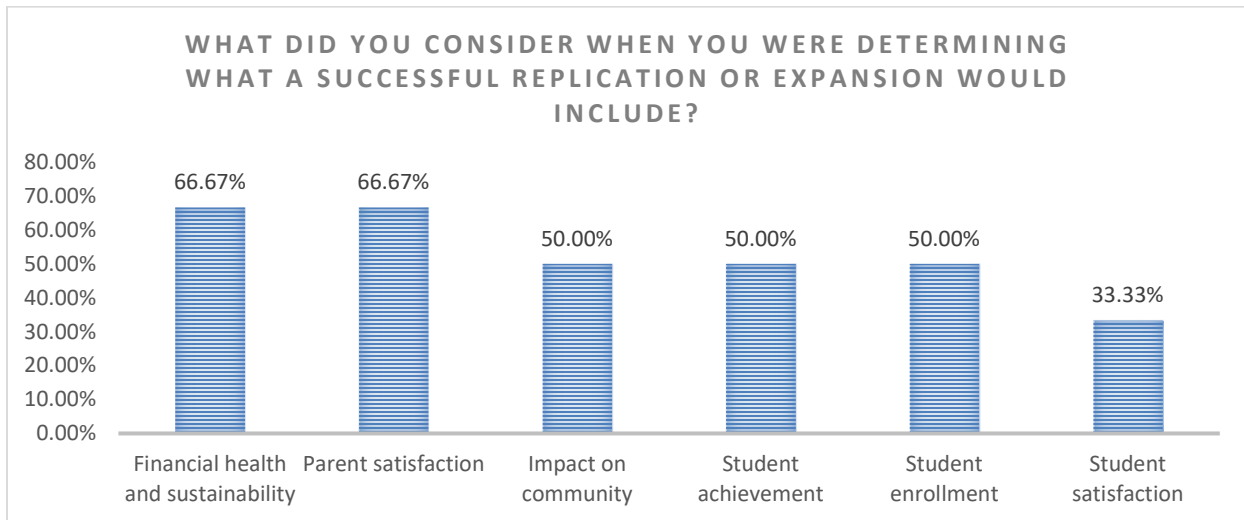

Respondents who planned for expansion or replication recommended the following tools and resources that they used in the planning process:

- Community surveys to determine the need for the school
- Market studies of the community
- Survey of current families
- Building a waitlist to demonstrate demand
- Planning for a slow expansion with one or two grade levels at first
- Hiring new staff as early as possible so they can have ramp-up time

The survey also asked respondents what factors they would consider as measures of a successful expansion or replication. Of the respondents who planned for an expansion or replication, 67% responded that they would use their school's financial health and sustainability as a measure, and 67% responded that they would use parent satisfaction as a measure. The complete list of measures that schools would use to evaluate a successful expansion or replication is shown below in Figure 3.
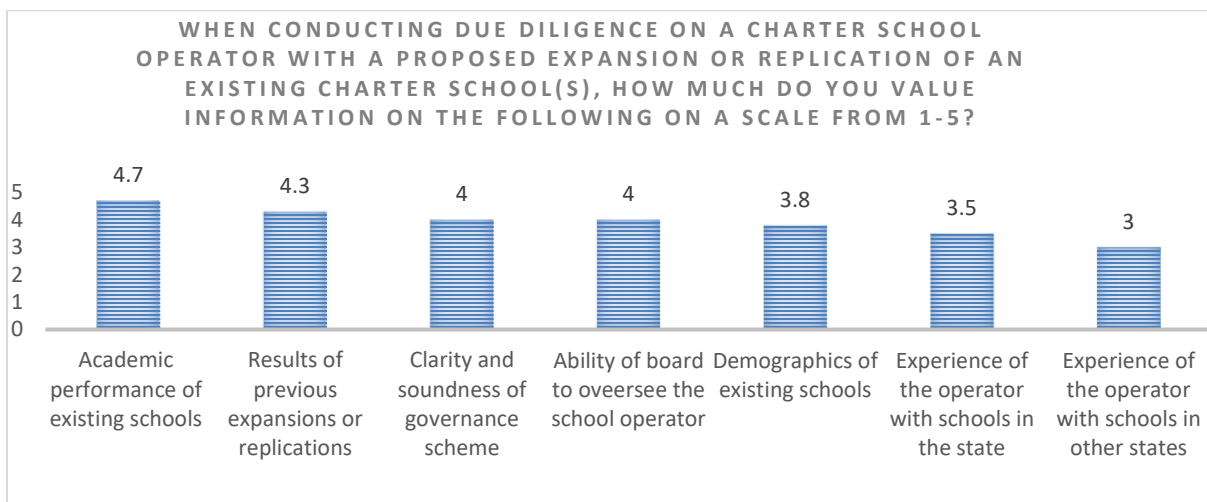
Figure 3. Factors of a Successful Replication or Expansion

WHAT DID YOU CONSIDER WHEN YOU WERE DETERMINING WHAT A SUCCESSFUL REPLICATION OR EXPANSION WOULD INCLUDE?

Category	Percentage
Financial health and sustainability	66.67%
Parent satisfaction	66.67%
Impact on community	50.00%
Student achievement	50.00%
Student enrollment	50.00%
Student satisfaction	33.33%

The survey also asked respondents who have planned for expansion or replication how they evaluated the impact of expansion or replication on student achievement. This question on the survey received limited responses. The three schools that responded said that they had looked at student behavior, student achievement, and their operating budget to evaluate the impact of expansion or replication on student achievement. The two district authorizers that responded reported that they had only looked at student achievement data to evaluate the impact of expansion or replication on student achievement.

District authorizers were asked to rate how much they valued different types of information when conducting due diligence on a charter school operator who is proposing an expansion or replication in their district. The highest-rated type of information was the academic performance of existing schools, followed by the results of previous expansion or replications. Figure 4 shows the complete rankings.

Figure 4. Value of Information When Conducting Due Diligence

WHEN CONDUCTING DUE DILIGENCE ON A CHARTER SCHOOL OPERATOR WITH A PROPOSED EXPANSION OR REPLICATION OF AN EXISTING CHARTER SCHOOL(S), HOW MUCH DO YOU VALUE INFORMATION ON THE FOLLOWING ON A SCALE FROM 1-5?

Category	Rating
Academic performance of existing schools	4.7
Results of previous expansions or replications	4.3
Clarity and soundness of governance scheme	4
Ability of board to oversee the school operator	4
Demographics of existing schools	3.8
Experience of the operator with schools in the state	3.5
Experience of the operator with schools in other states	3

Schools provided their opinions on the best way to effectively grow without compromising student achievement. They recommended:
- Create a strong school culture
- Develop a talent pipeline for teachers and leaders to help support the expansion or replication
- Spend time the previous year planning as much as possible before the expansion or replication
- For replications, provide the new school leader with a clear year-by-year plan for growth of the school
- Constantly communicate with the community to ensure they stay invested in the expansion or replication
- Plan for all of the financial resources necessary for the expansion or replication

District authorizers also provided their opinions on the practices they have observed that enabled a school to grow without compromising student achievement. Those practices are:
- Strong community engagement
- Hiring a strong school leader who dedicated time during year zero for planning and scaling
- Gathering strong evidence of demand by parents
- Creating a strategic plan for the expansion
- Partnering around facilities usage with the district
- Implementing strong instructional practices

Facility Process for Expansion or Replication

The survey asked questions about the facility changes involved in the expansion and replication process. Of those schools that planned for expansion or replication, 60% did not make any facility changes, 40% moved to an existing facility at a new location, and 20% built a new facility. No respondents made any facility improvements at their current location. When respondents were considering what type of facility change to make, they equally considered the facility capacity (50%), facility costs (50%), facility amenities (50%), projected enrollment growth (50%), and the real estate market (50%). Respondents considered facility financing options (25%) and availability of district facilities (25%) to a lesser degree.

Respondents spent between one to three years planning their facility change before actually making the change. When they were planning the facility change, the team involved in the planning process included the school leader and/or the executive director (67%), the school governing board (67%), facilities consultants or contractors (67%), parents (33%), and the owner's rep (33%). Respondents indicated that when they were planning for a facility change, 26-50% of their daily working hours were dedicated to planning for the facility change. Respondents used several key personnel to help project plan for their facility change including:
- Brokers
- Finance consultants
- Investors
- Real estate development teams
- Facility contractors
- Governing board

Respondents also recommended ensuring that the budget for the facilities change included expenses for small items such as copiers, storage, and lockers, as well as including allocated funds for repairs and maintenance of the facility.

The district authorizer survey also inquired about facilities. 57% of district authorizers who responded indicated that they approved major changes to charter school facilities in their district, while 43% did not. Additionally, when evaluating proposed facility changes, districts considered several issues. The issues they considered the most were facility capacity (86%) and facility financing options (86%). Figure 5 displays all of the issues that district authorizers considered.

Figure 5. Value of Information When Conducting Due Diligence
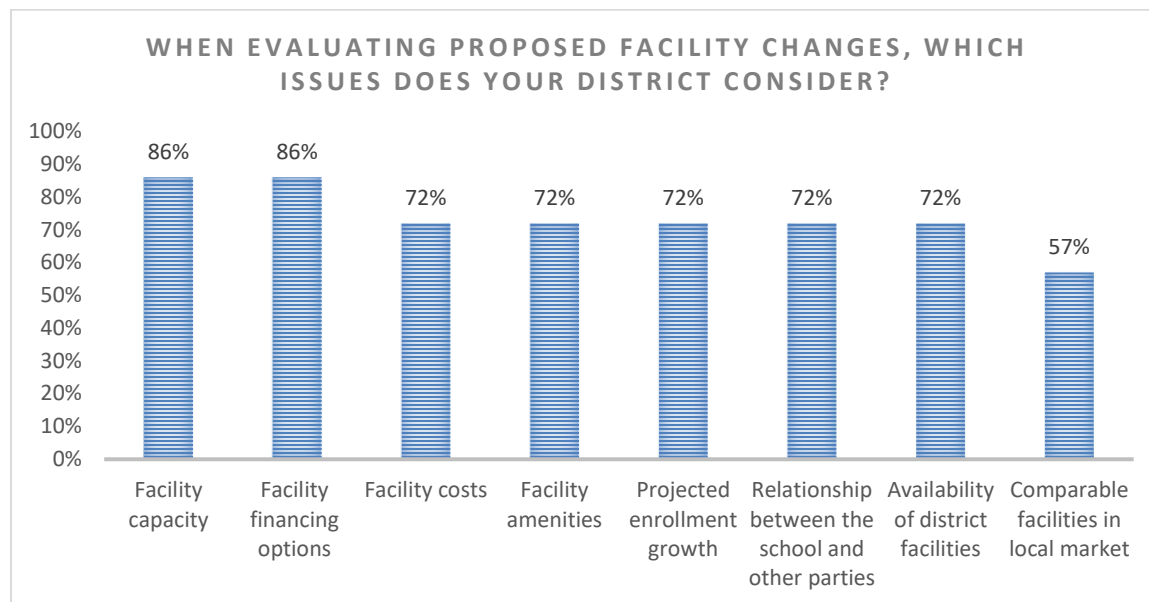
Results from CDE's Charter School Bootcamp

CDE hosts an annual Charter School BootCamp, most recently held in April of 2019. The event is targeted to those new to the charter school development landscape who have their sights set on designing and opening a charter school and acquiring a CSP grant. This year's event had over 40 registrants and over 40 presenters and facilitators with topics ranging from authorizing to finance to school safety. One new addition this year was a Facilities Panel that featured realtors, architects, and owner's reps, a facilities presentation, and facilities-themed workshops where attendees could get direct support from facilities experts on their school facilities plans. The pre- and post-event surveys revealed particular trends in the needs and interests of these new school developers, and a general summary of those results are featured below.

Event registrants self-identified as having an average of 5 years of experience in charter schools, and on a scale of 1-5, with 5 being the highest, their average self-rating of experience in the charter sector was just above average (3.24). Registrants rated themselves as around average on a similar 1-5 scale in the following categories: Level of knowledge (collectively, across ALL areas of governance, finance, operations, leadership) in opening a charter school in Colorado (2.92); confidence in understanding the charter schools facilities policies and procedures (2.81); level of understanding of the

different national, state, regional, and local accountability demands, including accountability to an authorizer (2.96); and confidence in finding grants, partnerships, and other supports for your startup charter school (3.19). Self-rated areas more than slightly higher than average were: Confidence in your ability to evaluate and build your school design team's capacity (3.73); level of understanding of what it takes to conduct meaningful community engagement and outreach (3.65); and how comfortable you are in working to develop an authentic authorizer relationship (3.62).

Sessions that participants found the most valuable (and rated the highest in a post-event feedback survey) were: The Authorizer Panel; the afternoon Workshop Sessions (where participants had the chance to work directly with experts and specialists across different areas of charter development); A High Quality, Successful Applicant: An Examination of the Quality Standards for Developing Charter Schools; Authentic & Ongoing Community Engagement & Outreach; the New School Developer Panel; and Starting a Charter: HR Structuring and Staffing Guidance. Participants were asked what areas they would like additional, more learning opportunities in, and 2 main categories emerged: budget and finance (46% of respondents indicated this area) and school governance (23%).

Suggested Content for Future Training Events

Based on the survey results, there are several areas of content that could be used for future training events that could address the barriers in opening high-quality schools, including:

- Conducting market research to determine the need for a new school
- Best practices to meet or increase student enrollment
- Finding and funding a facility
- Budgeting for facility changes
- Budgeting and finance for starting a new school
- Securing start-up funding
- Setting up backoffice operations
- Best practices for finding and hiring staff
- Navigating the authorization process
- Developing strong relationships with the authorizer
- Community engagement and outreach
- HR structuring and staffing policies
- School governance

Recommended Resources

Based on the results of the review of research, the data gathered from the surveys, and other resources available through the Colorado League of Charter Schools, the following list of recommended resources was developed. The resources are listed by topic.

Topic	Resource Name	Author	Description	Link
Board Governance	NCSRC Charter School Enrollment: A Toolkit for Board Members	National Charter School Resource Center	This toolkit developed by the National Charter School Resource Center identifies what boards should know and questions they should ask on enrollment, budgeting, and governance.	Charter School Enrollment Toolkit
Budget	SELF HELP Charter School Budgeting Worksheet	SELF HELP	This worksheet helps you identify your financial needs and what you may be able to afford.	Charter School Budgeting Worksheet
Budget	Navigating Charter School Finance	Colorado League of Charter Schools	This link describes the different financing sources available in Colorado.	Navigating Charter School Finance
Charter Application Process	Application Process Flowchart	Colorado League of Charter Schools	This link describes each step of the application process for starting a charter school.	Charter Application Process Flowchart
Community Engagement	Community and Family Engagement: Principals Share What Works	Coalition for Community Schools	This report describes the six keys to community engagement and what strategies actually worked for school leaders.	Community and Family Engagement: Principals Share What Works
Enrollment	Student Enrollment Playbook: Generating Leads	Charter School Growth Fund	This guide describes how to generate enough inquiries to fill enrollment.	Student Enrollment Playbook: Generating Leads
Enrollment	Student Enrollment Playbook: Reducing First Day No-Shows	Charter School Growth Fund	This guide describes how to ensure students attend the first day of school with strategies to reduce summer attrition.	Student Enrollment Playbook: Reducing First Day No-Shows
Enrollment	Student Enrollment Playbook: Maximizing Conversions	Charter School Growth Fund	This guide describes how to convert enrollment inquiries into enrollment conversions.	Student Enrollment Playbook: Maximizing Conversations
Facilities	Charter Facility Search Resource	Hier & Company	This resource describes the process for engaging in a facility search.	Charter Facility Search Resource
Facilities	Project Cost Calculator	LISC	This tool calculates the approximate amount a facilities project or new building may cost you.	LISC Project Cost Calculator
Facilities	SchoolBuild Webinar Series: Project Cost Calculator	LISC	This webinar explains the key factors in financial planning for a facility.	LISC School Build Webinar Series: Project Cost Calculator
Facilities	Affordability Facility Tool - Article	Charter School Growth Fund	This article provides guidelines for determining what facility you can actually afford.	Charter School Growth Fund Affordability Facility Tool - Article
Facilities	Affordability Facility Tool	Charter School Growth Fund	This is a downloadable excel sheet where you can enter in your information and determine if your facility project is affordable.	Charter School Growth Fund Affordability Tool
Facilities	School Daze: How to Project Capital Finance Needs	Charter School Growth Fund	This presentation describes the facility financing process and how to determine your financing needs.	Charter School Growth Fund How to Project Capital Finance Needs

Facilities	Furniture Purchasing Timelines	Colorado League of Charter Schools	This timeline helps to identify when you would need to make furniture purchases for your school.	Furniture Purchasing Timelines
Finance & Operations	Make Finance, HR, IT, and Legal Work for You, Instead of Bogging You Down	First Round Review	This article describes potential pitfalls and tips to avoid them related to startup operations.	Make Finance, HR, IT, and Legal Work for You
Marketing	Stand Out: A Guide to School Marketing	Colorado League of Charter Schools	This guide describes school marketing in four steps and includes tips on messaging.	A Guide to School Marketing
Nonprofit Management	Nonprofit Management Essentials Professional Development	Northwestern University	This website has a series of free webinars about managing a nonprofit.	Nonprofit Management Essentials
School Design	School Design Exercise	Colorado League of Charter Schools	This graphic organizer lets you identify key components of a mission aligned school design.	School Design
School Design	New School Development Toolkit	National Charter School Resource Center	This comprehensive toolkit has resources on community engagement, financial management, operations, governance and school culture.	New School Development Toolkit
School Design	Quality Standards for Developing Charter Schools	Colorado League of Charter Schools	This resource describes quality standards for developing a charter school to gauge readiness for submitting an application.	Quality Standards for Developing Charter Schools
School Design	New School Startup Plans & Timelines	Colorado League of Charter Schools	This timeline lists key components of opening a new school and when to work on each aspect.	New School Startup Plans & Timelines
School Design	School Purchasing Timeline	Colorado League of Charter Schools	This graphic organizer was designed to help schools think about all the purchases they need to make before opening.	School Purchasing Timeline