

# FERRIS STATE UNIVERSITY

CHARTER SCHOOLS OFFICE



## BOARD RESOURCES

## Introduction

This document serves as a comprehensive guide for charter school board members. It provides essential information on governance, compliance, and best practices for effective board oversight. It is structured to support board members in their fiduciary, strategic, and operational responsibilities, ensuring charter schools align with state and federal regulations while delivering high-quality education. You will find the following areas of emphasis in this guidebook:

- ★ The Ferris State University Charter Schools Office (CSO) plays a crucial role in overseeing and supporting charter schools through governance, compliance, fiscal and academic performance monitoring. It introduces key staff members who contribute to this mission, ensuring that schools meet state and federal regulations.
- ★ The governance model relies on a balanced relationship among the Authorizer (FSU Board of Trustees), the School's Board of Directors, and Educational Service Providers (ESPs) to ensure financial stability, policy adherence, and operational efficiency. The "Three-Legged Stool" model highlights that all three legs work together to ensure that our schools are providing a quality education for children in a safe and supporting environment.
- ★ To maintain performance accountability, the CSO evaluates charter schools based on four key pillars: Academic Progress, Fiscal Solvency, Operations and Compliance. Schools and boards are monitored through site visits, board meetings, and compliance assessments, with intervention plans implemented if performance need additional CSO support.
- ★ Legal compliance is reinforced through adherence to the Charter Contract, ESP Agreement and the Michigan Open Meetings Act, ensuring transparency in board governance. Additionally, Robert's Rules of Order is recommended for efficient board meetings and decision-making processes.
- ★ Financial oversight is a major board responsibility, emphasizing budgeting, audits, and enrollment planning to maintain fiscal sustainability.
- ★ Board members are required to engage in professional development, earning at least three training credits per year to enhance governance effectiveness.
- ★ Ensuring a safe and supportive learning environment is also a board priority, with policies addressing school safety, student privacy, and anti-discrimination, to name a few.

Finally, the guidebook includes an appendix with the Michigan Department of Education (MDE) frequently asked questions regarding charter schools, funding, and compliance under Michigan law, serving as a valuable resource for board members. Also found in the appendix are the CSO School Support Protocol, information about the CSO scholarship for graduates of FSU-authorized high schools and common terms and acronyms.

The Board Resources guidebook is a valuable tool for charter school board members, providing a structured approach to governance, financial management, academic progress, operations and compliance. By adhering to these best practices, boards can strengthen school performance, ensure legal compliance, and create an optimal learning environment for students.

# Table of Contents

Introduction	1
Table of Contents	2
Meet the Charter Schools Office Team	3
Roles and Responsibilities of the Authorizer, School Board, and Educational Service Provider (ESP)	10
Charter Contract and Educational Service Provider (ESP) Agreement	12
The Four Pillars	14
Vision, Mission, and Core Values of the School	16
Govern by Policy	17
Plan for the Future	18
Fiscal Oversight	19
Ensure the School is a Safe and Supportive Learning Environment	21
Board Professional Development	22
Michigan Open Meetings Act (OMA)	24
Robert’s Rules of Order	26
Excellence in School Board Governance	27
<b>APPENDIX A – MDE FAQs Michigan Charter Schools</b>	
<b>APPENDIX B – School Support Protocol</b>	
<b>APPENDIX C – Field Representative Report Templates</b>	
<b>APPENDIX D – FSU Scholarship for Graduates of Ferris-Authorized Academies</b>	
<b>APPENDIX E – Common Terms and Acronyms</b>	
<b>APPENDIX F – Charter Contract Handbook</b>	

## Meet the Charter Schools Office Team



**Chris Loiselle**  
Charter Schools Office  
Director  
ChrisLoiselle@ferris.edu  
(231) 591-5907

**Chris Loiselle** commenced his professional journey as a CPA at Arthur Andersen in Grand Rapids, Michigan. He was then hired by a client of the firm to fill the role of Chief Financial Officer and ultimately became the CEO. Driven by a profound passion for education, Chris resigned from his CEO position to pursue this interest. He initially served as an adjunct professor for various colleges in West Michigan. Eventually, he secured an Assistant Professor position at Cornerstone University.

During this period, Chris was invited to join Berrien Springs Public Schools as the Operations Director, tasked with assisting the leadership team in their expansion plans. In this position he successfully helped expand their coverage from a single location to 27 throughout Michigan. Simultaneously, Chris pioneered software development and founded Student Achievement Systems, a company dedicated to tracking and evaluating the engagement of virtual students and staff.

Chris is excited to advocate for educational opportunities within the Ferris community, and he is committed to championing the educational needs of charter students.



**Kelly Buckmaster**  
Charter Schools Office  
Associate Director  
KellyBuckmaster@ferris.edu  
(231) 591-5803

**Kelly Buckmaster** has experience in education as a high school principal, curriculum director, Title I coordinator, alternative high school principal, elementary principal, English and health teacher and have enjoyed each experience working at all levels. All of these experiences have brought her new learning, background in facing challenges, and the love of developing and working with a great team.

Kelly lives in Cadillac, MI, with her husband, Scott, and they have two adult children. Kait lives with her fiancé in Traverse City, and Keegan is a student at Central Michigan University living in Mt. Pleasant. Being outdoors in the sunshine and reading are some of her favorite things and in the last year and a half, she has taken up running and being a doctoral student at Central Michigan University.



**Beth Taylor**  
Charter Schools Office  
School Support Specialist  
BethTaylor@ferris.edu  
(231) 591-5805

**Beth Taylor** is originally from the Detroit area but has spent most of her adult life living in Grand Rapids, Michigan. She holds a bachelor's degree in Elementary Education from Central Michigan University and a master's degree in educational leadership from Grand Valley State University.

Beth's career has included 15 years of teaching middle school and several leadership positions, including Assistant Principal, Middle School Principal, Elementary Principal, and Virtual School Director.

On a personal note, Beth is an avid reader, and she enjoys traveling and being outdoors. Most of her trips involve college campuses, as she has sons at Central Michigan University, Michigan Technological University, and Western Michigan University. When not on the road, she can be found with her husband and eldest children at the lake or spending time with her grandson.

Beth is always up for a new challenge and is looking forward to maintaining high academic standards for all of the individual schools that FSU serves.



**Sharon Hopper**  
Charter Schools Office  
Compliance & Governance  
Specialist  
SharonHopper@ferris.edu  
(231) 591-5804

**Sharon Hopper** is our Compliance and Governance Specialist. She was born a Hoosier and moved to Big Rapids, Michigan at age six when her father took a position at Ferris as a professor. She earned an associate degree in legal assisting from Ferris, a bachelor's degree in public administration from Davenport University, and a master's degree in criminal justice administration from Ferris.

Throughout her career, Sharon has relished researching and analyzing laws, policies, and procedures and providing that information to others. She worked in the Kent County court system for 18 years as a pretrial investigator and enforcement officer. She joined the FSU family in 2007, working five years in the legal counsel's office as the labor relations and equal opportunity specialist, five years in the human resources department as the employee relations specialist, and now seven years with the CSO.



**Ahmad Wright**  
Charter Schools Office  
Charter to College Student  
Support Specialist  
AhmadWright@ferris.edu  
(231) 591-5809

**Ahmad Wright** joined the Ferris State University Charter Schools Office as our new Charter to College Support Specialist in November 2025.

In this role, Ahmad will serve as a direct resource for students transitioning from charter high schools to college, providing guidance, support, and advocacy throughout their postsecondary journey.

Ahmad brings a strong background in social work, holding both an associate and bachelor's degree in the field. His passion for supporting young people, particularly underserved students, aligns closely with our mission. He is deeply committed to helping students access and succeed in postsecondary opportunities, and he looks forward to collaborating with school teams to enhance college-readiness pathways.

Outside of work, Ahmad enjoys spending time with his dog, watching sports, and listening to hip-hop and R&B music. Looking ahead, he plans to begin his Master of Social Work program in the fall of 2026 to further deepen his expertise.



**Andrea Ruggles**  
Charter Schools Office  
Level 3 Secretary  
AndreaRuggles@ferris.edu  
(231) 591-5806

**Andrea Ruggles** is a Level 3 Secretary at the CSO. She has 25 years of dedicated service at Ferris State University. Throughout her tenure at Ferris, she has supported the College of Pharmacy Dean's Office, the Sports, Entertainment and Hospitality Management department, and is now in her third year with the CSO. She holds an associate degree in Legal Studies and a bachelor's degree in Integrative Studies, both from Ferris.

Prior to joining Ferris, she worked as a legal secretary for the Mecosta County Prosecutor's Office. Andrea grew up in the Big Rapids and surrounding area. In her free time, she enjoys devoting time to her husband and two children, her father, her siblings, and their families. She appreciates nature, loves sports and outdoor activities, and most everything that she, her husband, and children do ends up in some sort of a friendly competition.



**Alyssa Myers**  
Charter Schools Office  
Level 2 Secretary  
AlyssaMyers@ferris.edu  
(231) 591-5802

**Alyssa Myers** joined the CSO team in August 2024 as a Level 2 Secretary. She was born in Big Rapids, Michigan, and she graduated with a bachelor's degree in history from Ferris State University at the end of the Spring 2024 semester. Alyssa loves learning, and although she has graduated from Ferris, she will continue to take classes as time permits. In her free time, Alyssa likes to Facetime her niece, Faith, knit, read, and thrift shop. Alyssa is excited to be a part of the CSO team.



**Linda Bouman**  
Charter Schools Office  
Field Representative  
LindaBouman@ferris.edu

**Linda Bouman** grew up in Kalamazoo, Michigan. She is the daughter of a teacher and a school superintendent. She received her bachelor's degree from Central Michigan University, with a major in Teaching the Emotionally Impaired. She then attended Grand Valley State University, where she received her master's degree in Teaching the Learning Disabled. Linda has a 31-year career of educational service for grades K-12 in both regular and special education. Her last years were spent as a Title I Reading and Math Specialist, as well as serving as Interim Principal. Linda has also taught at the college level, instructing undergraduate classes and supervising student teachers. She has been a member of the CSO since 2019 and is the field representative for **Clara B. Ford Academy, Creative Technologies Academy, and Huron Academy.**



**Jack Gilbert**  
Charter Schools Office  
Field Representative  
JackGilbert@ferris.edu

**Jack Gilbert began** in June 2025 as the field representative for **Bridge Academy, Learn4Life Pontiac, Pillars Academy, and William C. Abney Academy.** He began his teaching career in McMinnville, Oregon after earning a master's degree in Special Education. His family moved to Michigan, where he taught in Alpena before moving to the Grand Rapids area. He taught and coached in Greenville, Michigan before serving as assistant principal in Menominee and then back to Greenville.

Jack continues to live in the Greenville area with his wife of 43 years, Sally. They have three grown children. His oldest is an elementary teacher. He is proud grandfather of three boys with another on the way. He enjoys spending all the time he can with his family and the Rhodesian Ridgebacks that are part of his family. Jack enjoys assisting in this valuable enterprise to serve the youth of our communities.



ToddOatlev@ferris.edu

**Dr. Michele Siderman**  
Charter Schools Office  
Field Representative  
MicheleSiderman@ferris.edu

**Todd Oatley** is the field representative for **Joy Preparatory Academy, Marshall Academy, Muskegon Montessori Academy for Environmental Change, and Pittsfield Acres**

**Dr. Michele Siderman** earned her bachelor's degree in social work from Grand Valley State University. She obtained her teaching certificate from Prescott College, two master's degrees in education from Northern Arizona University, and a Ph.D. in K-12 Educational Leadership from Western Michigan University. She began her career in social work but quickly realized this was not the right path for her and took an emergency teaching position at Woodard Junior High School in Yuma, Arizona. After nine years in Arizona, Michele moved back to Michigan to be closer to her family, and she took her first administrative position as an Assistant Principal and Athletic Director at Elk Rapids High School. From there, she landed a position at East Kentwood High School as an Assistant Principal and then was promoted to principal at the East Kentwood Freshman Campus, where she worked for 12 years. She joined the CSO in 2017 as is currently the field representative for **Hope Academy of West Michigan, Lighthouse Academy, Michigan Connections Academy, and New Bedford Academy**



RonniePhillips@ferris.edu

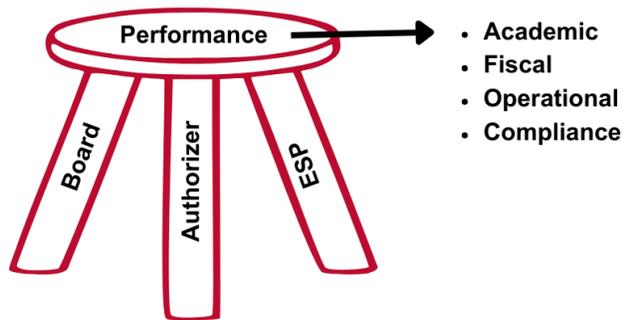
**Susan Wakefield**  
Charter Schools Office  
Field Representative  
SusanWakefield@ferris.edu

**Ronnie Phillips** earned a bachelor's degree in education from the University of Illinois and taught school at the elementary and high school levels for several years. He continued his career as a counselor, department head, assistant principal, principal, and superintendent. His extended career as an adjunct professor at Wayne State University allowed him to teach and supervise in the College of Education. Ronnie is currently an educational consultant and has authored approximately 34 articles and three books. He joined the CSO team in 2023 and is the field representative for **Hope of Detroit Academy, Michigan Collegiate, Red Oak Academy, and Voyageur Academy.**

**Montessori Academy, Benton Harbor Charter School Academy, Blended Learning Academies Credit Recovery High School, and Northridge Academy.**

## Roles and Responsibilities of the Authorizer, School Board, and Educational Service Provider (ESP)

The relationship of the Authorizer, academy Board of Directors, and Educational Service Provider (ESP), if applicable, is often referred to as **the three-legged stool**.



*A three-legged stool is always stable, regardless of its placement on an uneven surface. Keeping the top parallel to the floor and comfortable to sit on, however, requires careful steps to achieve balance among each of the three legs.*

*NACSA Issue Brief – Authorizing Matters  
Steadying the Three-Legged Stool: Authorizers, Charter Schools, and Educational Service Providers  
October 2006*

### Board

- Signs Charter Contract with authorizer
- Understands all aspects of the Charter Contract
- Meets/exceeds goals and requirements pursuant to the Charter Contract, law, and policy
- Establishes systems and processes to effectively monitor academy performance
- Ensures quality board candidates for authorizer consideration
- Fosters a transparent, no surprise approach with authorizer

### Authorizer

- Issues Charter Contract report to board
- Oversees compliance to charter performance contract
- Reauthorizes/renews Charter Contract
- Administers performance assessments on academics, finances, operations, and compliance
- Appoints and reappoints board members
- Expects transparent, respectful relationships with the board and ESP

### Educational Service Provider (ESP)

- Negotiates agreement with board that considers the Charter Contract's requirements/goals
- Procedurally administers business and operation functions that are in alignment with the Charter Contract and are in agreement with the board
- Through operational and business functions, the ESP is expected to meet/exceed all academy goals
- Provides clear, accurate, and timely information in support of the board's monitoring systems/processes
- Works in cooperation with the board in identifying board candidates for board consideration
- Establishes transparent, trusting, communicative relationship with the board

All three legs work together to ensure that the performance standards established in the Charter Contract are met in the areas of academic, fiscal, operational, and compliance performance. Below is a summary of the roles, responsibilities, and expectations of each stool leg.

### Authorizer

- ✓ **Monitors Compliance with State and Federal Laws** – Ensures the school meets all legal requirements beyond the Charter Contract, including special education, civil rights, and reporting obligations.
- ✓ **Provides Intervention and Oversight for Underperformance** – Sets clear expectations for improvement when schools fail to meet performance benchmarks.
- ✓ **Facilitates School Autonomy While Ensuring Accountability** – Strikes a balance between oversight and allowing schools to innovate within their charter.
- ✓ **Manages School Closure Processes When Necessary** – Implements a responsible and transparent process for non-renewal or closure of schools that fail to meet standards.
- ✓ **Engages in Continuous Improvement of the Authorizing Process** – Regularly reviews policies and practices to align with best practices in charter school oversight.

### Board of Directors

- ✓ **Holds the Educational Service Provider (ESP) Accountable** – Regularly evaluates the ESP's performance to ensure it meets contractual, financial, and academic expectations.
- ✓ **Oversees Fiscal Health and Resource Allocation** – Ensures responsible budget oversight, financial sustainability, and compliance with state and federal regulations.
- ✓ **Sets Strategic Vision and Policy Direction** – Guides the school's mission, vision, and long-term strategy while ensuring alignment with the Charter Contract.
- ✓ **Ensures Compliance with Legal and Ethical Standards** – Upholds all applicable laws, policies, and governance best practices, including conflict of interest policies.
- ✓ **Engages with School Stakeholders** – Establishes effective communication with families, staff, and the community to support transparency and responsiveness.
- ✓ **Implements Effective Board Governance Practices** – Maintains proper board training, meeting protocols, and decision-making processes to function as an effective governing body.
- ✓ **Monitors and Evaluates School Leadership (if applicable)** – If the school leader is not managed by the ESP, the board ensures strong leadership by hiring, evaluating, and supporting the school's principal.

### Educational Service Provider (ESP)

- ✓ **Implements and Supports Academic Program Execution** – Ensures academic plans aligns with charter goals and supports student achievement.
- ✓ **Manages School Personnel (if applicable per agreement)** – Handles hiring, training, evaluation, and HR compliance, while ensuring alignment with school goals.
- ✓ **Ensures Financial Sustainability and Compliance** – Oversees budgeting, financial reporting, and audits to maintain fiscal responsibility and compliance with legal and contractual requirements.
- ✓ **Develops and Maintains Compliance Systems** – Ensures adherence to state, federal, and Charter Contract requirements across all operational areas.
- ✓ **Supports Board in Strategic Planning** – Provides data, insights, and operational expertise to assist the board in long-term decision-making and continuous improvement.
- ✓ **Maintains Positive and Productive Relationships with Authorizer** – Ensures responsiveness to authorizer requirements and fosters a cooperative oversight relationship.
- ✓ **Engages with School Community and Stakeholders** – Builds trust and communication with parents, staff, and the broader school community to support the school's success.

## Charter Contract and Educational Service Provider (ESP) Agreement

### Charter Contract

The State of Michigan, through an authorizing body, grants a Public School Academy (PSA) the authority to educate public school students. To achieve this goal, a PSA will receive state and federal funds. The FSU Board of Trustees and the academy Board of Directors enter into a written agreement called the Charter Contract.

The Board of Directors is the entity legally responsible for governing and overseeing the operation of the school. Therefore, it is imperative that board members read and understand the Charter Contract. In order to govern wisely and for the school to operate optimally, the board must know the basic promises made between the academy and FSU that are set forth in the Charter Contract.

Without a working understanding of the Charter Contract's contents, the board and its individual members cannot exercise their fiduciary and other legal responsibilities. For example, without an understanding of the fiscal agent agreement, the board won't know how state aid funds flow to the academy. Without an understanding of the educational goals, the board cannot understand the context of the academic data shared with the board. Based on the principles of good school board governance and on behalf of the families and taxpayers who trust the school to prepare students for college, work, and life, both the board and its individual board members need to have an understanding of the Charter Contract.

Without going into details of the contract language itself, we want to highlight what is at the core of the Charter Contract. **It is the promise to measurably improve academic achievement for all groups of students.** At board meetings, all discussions, presentations, and the examination of documents should begin with the question, How does this relate to improving academic outcomes for students? In addition, the Charter Contract contains important information regarding other Michigan statutory and legal requirements.

All board members receive an electronic copy of their academy's respective Charter Contract with the FSU Board of Trustees. For quick reference and clarification, we encourage the board to keep a copy of the Charter Contract on hand during board meetings.

The board's Charter Contract with FSU is for a specific duration. For example, a three year contract would be July 1, 2025 – June 30, 2028 and a five year contract would be July 1, 2025 – June 30, 2030. While compliance with the contract is regularly monitored, the CSO Team also conducts a formal mid-contract review mid-way through the length of the contract and a reauthorization review in the final year of the contract. This transparent process involves all key stakeholders, including school leadership, board members, parents, and students.

### Educational Service Provider (ESP) Agreement

An Educational Service Provider (ESP), also known as a management company, is a for-profit or non-profit organization that contracts with charter schools to provide services. Michigan law permits charter school boards to contract with ESPs for various school staffing and support functions, which may include facility management, personnel management, payroll and accounting, curriculum development, and professional development services for staff and teachers.

An ESP agreement is a contract between the charter school board and an ESP. The agreement outlines the roles and responsibilities of each party and includes specific performance targets that align with the Charter Contract's

requirements. Each ESP agreement is unique. Some charter school boards contract for only one or two services, such as human resources or accounting, whereas others choose to contract for all day-to-day staff functions.

The charter school board is responsible for setting policy, directing operational and academic performance and ensuring fiscal stability. Regardless of the type or level of support for which it is contracted, each ESP operates under the direction of the charter school board. **Therefore, the board is responsible for holding the ESP accountable for the services it provides.**

Before the board and ESP enters into a final agreement, the Director of the Charter Schools Office must review the agreement to ensure it is in compliance with the ESP Policy of the Charter Contract and other legal requirements. As the authorizer, FSU, reserves the right to disapprove the proposed agreement if it is not in compliance with its policies. Conversely, the FSU CSO does not approve any ESP agreements. The board's agreement with the management company is for a specific duration that cannot exceed the length of the Charter Contract with FSU.

## The Four Pillars

The Ferris State University (FSU) Charter Schools Office (CSO) has established a method for evaluating school performance that utilizes four pillars:

1. **Academic Progress**
2. **Fiscal Solvency**
3. **Operations/Governance**
4. **Compliance**

The CSO uses several support indicators to monitor and assess the performance of the academies that it authorizes. The CSO is guided by the performance standards as described in the National Association of Charter School Authorizers Principles and Standards for Quality Charter School Authorizing.

### Performance Standards

Performance standards enable schools and authorizers to know the outcomes for which authorizers will hold schools accountable. They are the basis for school evaluation and should be incorporated into the Charter Contract. Academic, financial, operational, and compliance performance standards should include clearly defined and measurable indicators, measures, metrics, and targets that:

- **Academic Performance:**
  - Set expectations for student academic achievement status or proficiency, including comparable proficiency
  - Set expectations for student academic growth, including adequacy of growth toward state standards
  - Incorporate state and federal accountability systems, including state grading and/or rating systems
  - Set expectations for postsecondary readiness, including graduation rates for high schools
  - Provide schools with the option to incorporate mission-specific performance measures for which the school has presented valid, reliable, and rigorous means of assessment approved by the authorizer
- **Financial Performance**
  - Enable the authorizer to monitor and evaluate the school's financial stability and viability based on short-term performance
  - Enable the authorizer to monitor and evaluate the school's long-term financial sustainability
  - Define financial management and oversight standards based on generally accepted accounting principles
- **Operational Performance**
  - Define the key design elements of the educational program for which the authorizer will hold the school accountable
  - Hold school governing boards accountable for meeting statutory and board established operating and reporting requirements
  - Ensure school compliance with student and employee rights and obligations
  - Establish expectations related to the school environment, including health and safety, transportation, facilities, and the appropriate handling of records

- **Compliance Performance**

- Enable the authorizer to monitor staff certification and legal documentation required for school employees
- Ensure school compliance with all required insurance policies and level of coverage
- Establish on-time expectations for Epicenter submissions
- Enable the authorizer to monitor the accuracy of Epicenter submissions
- Ensure school and board compliance with all state and federal requirements

The support designation in a particular pillar may be adjusted throughout the academic year depending on changing data and fluctuations in the academy’s key support indicators. In all cases, the academy’s Board of Directors shall be apprised of any alterations to the academy’s school color designation by representatives of the CSO.



Depending on each individual analysis, academies with either a yellow or red status in any pillar may be required to complete a support plan and will receive the assistance of the CSO School Support Team in enacting that plan. Please see **Appendix B** for detailed information about the School Support Protocol. It is the goal of the School Support Team to work with the academy to help resolve the issues indicated. It is not the intent of the CSO to assume the operations or governance of the academy.

The CSO takes its oversight and support responsibilities seriously. Our ability to provide effective oversight is dependent on the Field Representatives. Each academy and board is assigned a Field Representative. Our Field Representatives have extensive backgrounds in the public education system. They bring a wealth of knowledge and experience, and as such are a valuable resource for the board and school leadership.

Field Representatives attend all regular board meetings, visit classrooms, conduct safety and security checks, gauge school climate and culture, meet with school leaders, and attend school events. Field Representatives are the CSO’s eyes, ears, and voice in the field.

To help us continually monitor and assess the performance of the school and board and gauge the level of CSO support needed, your Field Representative will collect information and share it with the school leader, Board of Directors, and CSO staff. This information is documented in the following forms: School Safety & Security Checklist, Classroom Visitation Report, School Climate & Culture Report, School Support Documentation, and Board Meeting Report. Templates of these documents can be found in **Appendix C**.

## Vision, Mission, and Core Values of the School

The school board takes the lead role in establishing vision and mission statements that are linked to the academy's core values. Together, these three elements serve as the "DNA" of the school. A **mission statement** defines what the school does currently, a **vision statement** describes where the school wants to be in the future, and **core values** represent the guiding principles and ethics that the school will uphold while achieving its goals.

**The vision statement paints a picture of the end goals of the school.** It should be concise, inspirational, and realistic.

It addresses the following questions.

- What kind of school do you want?
- Where do you want the school to be in 5-10 years?
- What direction do you want to go in?

**The mission statement should also be concise, inspirational, and realistic.** It should address the following questions.

- What distinctive programs and curriculum are we offering?
- What is our educational philosophy?
- What is our target market?
- What are our values?

Vision and mission statements should be promoted. Display opportunities include:

- The school entrance
- Letterheads, websites, promotional materials, and flyers
- Training sessions, professional development events, and board meetings

These statements:

- Guide daily decisions
- Provide future direction
- Inspire those within the school to work toward common goals
- Define the school's goals and philosophy for students, parents, teachers, school leaders, staff members, board members, and the outside community
- Define the unique character, core values, priorities, educational programs, target population, and goals of the school

The school's vision and mission should be at the forefront of every board discussion, debate, and decision. Most boards include the statements on their board meeting notice to the public, agendas, and minutes. Some boards recite and reflect on the mission and vision during regular board meetings.

## Govern by Policy

One of the most critical roles of a public school board is to establish policy and govern consistently with policy language. By developing and adopting comprehensive board policies, public school boards are positioning themselves to govern in a proactive environment. Boards need to use policy as a guide in decision-making, rather than refer to policy *after* circumstances develop and/or surface.

At a minimum, public school boards should adopt policies that codify the legalities of operating a public school. These policies might include, but are not limited to:

- Non/Anti-Discrimination
- Section 504/Americans with Disabilities Act
- Student Privacy and Parental Access to Information (FERPA)
- Admission of Students
- Anti-Harassment and Bullying
- Drug-Free Environment
- Suspension and Expulsion
- Student Seclusion and Restraint
- Wellness

It is important to note, however, that whether a board has adopted policy or not, laws must be followed. Written policy is a way to commit laws and legalities to practice.

Beyond legal policy, there may also be best practice policy(ies) that boards may wish to establish and adopt. Best practice policies are generally customized to meet the policy needs of the board's academy.

Examples of best practice policies might include, but are not limited to:

- Certain board functions and practices (i.e. filling board vacancies, posting meetings, board duties, etc.)
- Assessment of Goals
- Curriculum Development
- Adoption of Courses of Study
- Homework
- Board/Staff Communications
- Staff Ethics
- Personal Communication Devices

The National Charter Schools Institute (NCSI) offers services that can help charter school boards with policy development. The NCSI offers a cadre of policies from which boards can make policy customization and adoption decisions.

## Plan for the Future

An effective school board develops and implements a written **strategic plan** to ensure the school stays on a path toward fulfilling its mission and vision. The school leadership/ESP manages the day-to-day operations of the school, but **the board establishes the school's direction in its long-range strategic plan**. The process articulates the vision and mission in clear annual goals and objectives. Each goal includes outcomes data that can be measured and monitored for progress and used to formulate school improvement strategies. By including representatives from all stakeholder groups, the process encourages consensus building and mutual ownership of the plan.

**The strategic plan is typically developed with the full board during a special board retreat or workshop.**

Some boards benefit from an expert in school strategic planning to facilitate the process and discussion. Other boards prefer to manage the strategic planning process through the use of a committee. The team should be small and manageable, but representative of the stakeholders (i.e., parents, staff, board, community members, school leadership). Include individuals with a variety of backgrounds, talents, personalities, and thinking styles.

The purpose of the process is to develop a document that can be understood by all stakeholders; that includes the vision and mission statements, annual and long-term objectives, functional strategies, assigned individual responsibilities, and status toward meeting goals. A SWOT analysis (strengths, weaknesses, opportunities, threats) might be used.

**Steps in strategic planning may include:**

- Asking strategic questions
- Setting goals
- Implementation strategy

**Strategic questions may ask:**

- Is the school still in line with the founding statements? If not, should the school change or should the founding statements change?
- What external factors have an impact on the school?
- What are the strengths, weaknesses, opportunities, and threats?

**Using vision and mission statements and the answers that are generated by asking strategic questions, the board or strategic planning committee should create long-term goals. At a minimum, these goals should include:**

- Student achievement and growth
- Professional development for the board, school leaders, and professional staff
- Financial stability
- Facility development and improvement
- Enrollment management
- External and internal relationships

After setting goals, the board/committee should focus on implementation strategies, noting how and by whom the progress will be monitored and reported. Effective boards have a standing agenda item regarding the strategic plan at every regular board meeting with stakeholders in which the board will discuss goals, reporting progress, and next steps.

## Fiscal Oversight

**Financial health and sustainability of the school is second only to academic progress in importance as a board responsibility.** Board members have a responsibility to ensure that school leaders and/or the Educational Service Provider (ESP) have competently and effectively managed public funds designated to the school.

### As a Board Member:

- Do you know when spending does not line up with the adopted budget?
- Do you understand the financial reports?
- Do you require your school leaders or the ESP to explain discrepancies and overspending of the budget?

Your responsibility is to ensure that budgets, budget amendments, and quarterly financial reports are made with board involvement on a timely basis.

### Consider the following:

- Do you receive the proposed budget far enough in advance of the scheduled budget hearing to permit you time to review it, understand it, frame meaningful questions, and negotiate changes?
- Do you compare the proposed budget with past budgets to understand income and expense trends?
- Do you have a board member with financial expertise to understand, explain, and ask questions about the budget?

An **annual financial audit** of the school is legally required and must be conducted by an independent auditor. Pursuant to the Charter Contract, the auditor must be different from the ESP's auditor. The audit will be presented at a board meeting, with the board officially accepting the audit and its findings.

### Consider the following:

- Does the auditor explain the audit to the board?
- Is the explanation understandable?
- Does the board have any questions or concerns?

**Student Enrollment** is a key factor that affects the budget. The board and ESP/school leadership must have open, honest, and transparent discussions about enrollment and its impact on the budget.

### Consider the following:

- Is enrollment stable and near capacity?
- What is the attrition rate?
- What are the reasons for attrition? This issue may need to be addressed in the board's strategic planning.
- What is the recruitment plan? Is it effective?

## Basic Financial Information

**Governmental Accounting** is the method of accounting that public school academies use. Governmental accounting operates using fund accounting, which emphasizes accountability over profitability. Fund accounting is a self-balancing mechanism that sets apart specific "funds" for specific purposes. These fund types are governmental, proprietary, and fiduciary funds.

**The Balance Sheet** is the position of the fund or academy as of a specific date. There should be a separate balance sheet for each fund the school operates. The three components of the balance sheet are assets,

liabilities, and fund balance. The balance sheet can be expressed in this formula: Liabilities + Fund Balance = Assets, which means that the liabilities and fund balance added together, must equal the total assets balance.

**The Income Statement** can be compiled for any specific time period, but generally is prepared quarterly or annually for each fund of the school. This statement compiles all of the revenues and all of the expenditures for the time period specified, and the net is what is added to the beginning fund balance on the balance sheet.

**The Budget to Actual** is a report that depicts the income statement, which is the "actual" information for the period, compared to the original adopted budget for the fiscal year. The Uniform Budgeting and Accounting Act requires that the academy board adopt a budget at a public hearing prior to the start of the fiscal year for the general fund and any special revenue funds; **any variance from actual above 1% is considered a violation of the act.**

## **State Aid**

The primary source of revenue for many public schools is state aid. State aid funds are based on a dollar amount (foundation) per pupil for each student in the school district. Each school district undertakes student population counts in the fall and again in the winter of each school year to determine student membership; these population counts are the basis for the amount of state aid each school will receive.

State aid payments go directly to the authorizer—Ferris State University (FSU). FSU charges a 3% administration fee and reduces the state aid payment by that amount and then remits the remainder to each school. FSU only takes the authorizer fee from the school foundation amount, not from title programs or special education.

## **Reporting Requirements**

Public school academies have many reporting requirements throughout the fiscal year to meet requirements set forth in the Charter Contract, grant agreements, and federal/state statutes. As the authorizer for the academy, FSU requires the submission of specific financial statements for review on a quarterly basis: a balance sheet, income statement (year-to-date), and a budget to actual (year-to-date).

## Ensure the School is a Safe and Supportive Learning Environment

For parents, public school safety remains a primary concern when making decisions about where their child/children will be educated. It is incumbent upon the school board to ensure that the school has the highest of safety standards, both on the exterior and interior of the grounds and facility. The board should also ensure the school provides a positive school climate and culture. Safe and supportive learning environments are critical to the well-being of the whole school community, as well as the academic success of students.

These environments aim at creating and nurturing positive school climates, preventing school violence, and protecting the whole school community through school safety, security, and emergency management and preparedness planning.

Positive school climate and conditions for learning contribute to improved test scores, improved attendance, grade promotion, and improved graduation rates. Efforts to improve school climate and safety can help reduce disciplinary incidents and violent behavior. A safe and supportive learning model addresses climate and culture in three primary areas: environment, safety, and engagement. It is incumbent upon school boards to ensure that the vision statement, mission statement, core values, and policies adopted by the board captures the essence of these key characteristics.



Source: US Department of Education

## Board Professional Development

School board members serve as representatives of their community and work to promote student success and achievement. When performing such important work, evaluative processes and opportunities for board member development are vital. These practices promote reflection of the current functions of the board and identify areas for growth to improve board and school performance.

School boards have the ability to cultivate a culture within the district that values development, personal and professional growth, and continuing education. To be resilient and effective leaders, school boards must participate in practices that improve the skills and knowledge of board members, while enhancing board and school procedures.

Board professional development opportunities provide school board member with focused and structured opportunities to gain knowledge and skills to govern their school more effectively. These opportunities can provide continuing education on a variety of topics and skills, such as:

- Responsible governance
- Collaborative leadership
- Community relations
- Conducting effective board meetings
- Education programs, curriculum, and supports
- School board roles and responsibilities
- School leader relations
- Fiscal oversight
- Board officer roles and responsibilities

Key reasons why school board professional development is important:

- **Informed Decision-Making:** By staying current with educational research and trends, board members can make better decisions regarding curriculum, budgeting, and policy development.
- **Community Representation:** Understanding diverse community perspectives allows board members to advocate for the needs of all students at their school.
- **Effective Governance:** Developing leadership skills and understanding of board dynamics enables efficient and collaborative governance practices.
- **Accountability:** Professional development helps boards hold themselves and the school accountable for student outcomes.
- **Building Capacity:** Continuous learning empowers board members to address challenges and seize opportunities related to emerging educational and legal issues.
- **Collaboration With Staff:** A well-trained board can better collaborate with administrators and teachers to implement effective strategies for student success.
- **Building Public Trust:** Demonstrating a commitment to ongoing learning enhances public confidence in the school board's ability to lead the school.

The CSO strongly believes that well-trained and effective school board members will positively impact student success. All boards, not individual board members, are required to obtain at least three professional development activity credits per academic year. At least two board members must participate in professional development opportunities to earn activity credits. To receive the credit, the board member must share 2-3 takeaways with the full board during a board meeting.

Below is further information about school board professional development opportunities:

<b>Board Professional Development Activity</b>	<b>Description/Example</b>	<b>Number of Activity Credits Awarded</b>
Full Board Activity	<ul style="list-style-type: none"> <li>• Board Retreat</li> <li>• Strategic Planning Meeting</li> <li>• Book Study</li> </ul>	Two activity credits
Individual Board Member Watches Epicenter Training Video	<p><b>Video Topics:</b></p> <ul style="list-style-type: none"> <li>• Educational Goals</li> <li>• Freedom of Information Act (FOIA)</li> <li>• Open Meetings Act (OMA)</li> <li>• Charter Contract</li> <li>• Finances</li> </ul>	.25 activity credits per board member per video
Individual Board Member Attends FSU CSO Sponsored Opportunity	<ul style="list-style-type: none"> <li>• Webinar</li> <li>• In-person session</li> </ul>	One activity credit per board member per session
Individual Board Member Attends Meeting of Another Public Governing Board. <ul style="list-style-type: none"> <li>○ The board member cannot be a member of this group or be required/requested to attend by their employer.</li> </ul>	<ul style="list-style-type: none"> <li>• Neighboring School Board Meeting</li> <li>• City, County, or State Public Meeting</li> </ul>	One activity credit per board member per meeting
Individual Board Member Attends Educational Workshop/Conference/Webinar	<ul style="list-style-type: none"> <li>• Any workshop, conference, or webinar related to board governance, charter schools, or education (e.g. sponsored by MAPSA, NCSI, MASB, or NACSA)</li> </ul>	One activity credit per board member per workshop or conference

## Michigan Open Meetings Act (OMA)

The basic intent of the Michigan Open Meetings Act (OMA) is to require public bodies, such as school boards, to conduct business at open meetings. It promotes transparency and provides Michigan citizens with the opportunity to participate in the meeting and better understand the decisions the public body is making. The OMA sets forth requirements for public meetings that include notification, public participation, rules for holding closed meetings, and the legal requirements for meeting minutes.

Below are important components of the OMA and/or best governance practices. For specific questions, please contact the Charter Schools Office (CSO) and/or your board attorney.

### **Board Member Attendance:**

- Must physically attend all board meetings
- Board members on active military duty may attend virtually

### **Board Calendar:**

- Must be physically posted at the school and on the school's website 10 days after the first meeting of the board in each fiscal year
- Revised board calendar must be physically posted at the school and on the school's website 3 days after the meeting at which the change is made

### **Public Notice of Meeting:**

- Must contain date, time, and place of the meeting
- Must be physically posted at the school at least 18 hours before the meeting

### **Rescheduled Meeting:**

- Isolated change in the date of a single regular meeting
- Must be physically posted at the school at least 18 hours before the meeting
- Rescheduled meeting must be scheduled during an open meeting

### **Special Meeting:**

- Held for a specific purpose and for matters or issues that cannot wait until a regularly scheduled meeting
- Must be physically posted at the school at least 18 hours before the meeting
- Cannot be held in lieu of a regular meeting
- Public Notice of meeting must include "For the purpose of \_\_\_\_" for transparency purposes
- The board can consider/act on only those items that are listed as the purpose. No other items should be considered
- Special Meetings can only be called by board members
- Board retreats are considered special meetings

### **Closed Sessions:**

- A closed session cannot be held unless its purpose is expressly recognized as legitimate by the OMA. The purpose for the closed meeting must be identified in the minutes of the open meeting.
- **Legitimate Purposes for Closed Sessions:**
  - Complaints and disciplinary action against an employee or board member *if the named person requests a closed hearing*
  - Periodic personnel evaluations of an employee or board member *if the named person requests a closed hearing*
  - Student discipline *if the student, student's parent, or student's guardian requests a closed hearing*
  - To consider the purchase or lease of property

- To consult with attorney regarding specific pending litigation, *only if an open meeting would have a detrimental financial effect on the litigation or settlement position of the public body*
- Applications for employment and appointment to public office, *only if the candidate requests that the application remain confidential*
- Consideration of material exempt from discussion or disclosure by state or federal statute including an attorney's written legal opinion, not oral
- To consider security planning to address existing threats or prevent potential threat to the safety of the students and staff
- Separate meeting minutes must be taken
- Closed session is for discussion purposes only, all decisions by the board must be made in the open meeting

**Quorum:**

- A quorum is a majority of the number of board positions are physically present at the meeting. If the academy board has seven positions, a quorum is four. If the academy board has five positions, a quorum is three.
- If quorum exists, the public meeting may proceed.
- If quorum does not exist, the public meeting may proceed, but only as an informational meeting. No board decisions can be made.

**Public Attendance and Comments:**

- Must provide the public with reasonable accommodation under the Americans with Disabilities Act (ADA)
- Permits a person to address the public body under rules established by the public body
- Permits tape-recording, videotaping, and broadcasting on live radio and telecast
- Public is not required to register or provide their name

**Proposed Board Meeting Minutes:**

- Must be made available to the public within eight business days after the meeting
- Must contain the name/signature of the person that took the minutes

**Approved Board Meeting Minutes:**

- Must be made available to the public within five business days after the meeting in which they were approved
- Must contain two names/signatures: the person that took the minutes and the board secretary

## Robert's Rules of Order

To have an effective and efficient board meeting, Robert's Rules of Order—a manual of parliamentary procedures that dates back to 1876—is the standard for facilitating group discussion and decision making.

The first rule is to have a board meeting agenda. An agenda acts as a roadmap to guide the discussion, ensure all important topics are covered, facilitate efficient decision making, and prevent unnecessary tangents by clearly outlining the meeting's structure and, ultimately, maximizing the productivity of the board meeting.

At a minimum, the agenda should include:

- Call to order
- Roll call of board members
- Others present
- Approval and/or correction of meeting minutes
- Correspondence the board received
- Board committee reports
- Special reports
- Old business
- New business
- Announcements
- Public comments
- Restatement of the date, time, and place of next board meeting
- Adjournment

## The Basic Rules

- The rights of the board supersede the rights of individual members
- All members have equal rights, privileges, and obligations
- All members have the right to participate in the debate/discussion
- A quorum must be present to conduct business
- The majority rules
- One motion/topic/question at a time
- One speaker at a time
- Each item presented for consideration is entitled to a full and free debate/discussion
- Motion must receive full debate/discussion
- Personal remarks or side discussions are out of order
- No member should speak more than twice to each motion. The second time takes place after everyone wishing to debate/discuss the motion has had an opportunity to speak once.
- Proposed meeting minutes signed by the person that took them
- Approved meeting minutes signed by the person that took them and the board secretary

## 6 Steps of a Motion

1. **Motion:** A member states the motion
2. **Second:** Another member seconds the motion
3. **Restate the Motion:** Board president restates the motion
4. **Discussion/Debate:** The board members discuss/debate the motion
5. **Vote:** The board president restates the motion and then first asks for affirmative votes, then negative votes
6. **Announce the vote:** The board president announces the result of the vote and any instructions

## Excellence in School Board Governance

Effective school boards aren't simply born. They are built with intentionality and a combination of elements, from teamwork to strategic planning to alignment and accountability. Overall, good school boards prioritize student growth and achievement, actively monitor progress using data, establish supportive policies, build strong community relationships, have a positive and collaborative relationship with school leadership, and strategically allocate resources to achieve the vision of the school. Boards that strive for governance excellence have the following distinctions.

- **Routinely define, clarify, and discuss the role of the board and Educational Service Provider (ESP).**
  - a. **Role of the Board:** Direct, expect, verify, appreciate, learn, repeat
  - b. **Role of the ESP:** Implement, assess, report, appreciate, learn, adjust, repeat
  
- **The board focuses on academic progress.** Student growth and achievement are reported at every regular board meeting. Contractual goals are in place to hold everyone accountable. Use all available data to drive board decisions. Constantly ask these questions:
  - a. What do we want our students to learn?
  - b. How will we help them learn?
  - c. How will we know if they have learned?
  - d. What will we do for the students who have learned and those who have not learned?
  
- **The board concentrates on the school's financial health and sustainability.** Financial documents, budget, and enrollment information are reviewed and discussed at every regular board meeting. Important fiscal board responsibilities include:
  - a. Holding an annual public budget hearing
  - b. Creating, monitoring, and approving the annual budget and its amendments
  - c. Reviewing monthly and quarterly financial reports and statements
  - d. Creating policies and procedures to promote financial transparency and accountability
  - e. Enrollment and enrollment projections
  - f. Reviewing the annual audit and its findings
  
- **The board has a live strategic plan.** To drive discussion, this should be a standing agenda item for board meetings. Stakeholders discuss goals, report progress, create action plan, etc. with the aim for continuous improvement. Annually, the board should formally review and revise the live strategic plan with school leadership.
  
- **The board has updated policies and procedures.** Most board decisions are predicated on what the board policy/policies stipulates. Also, consider other documents that may aid in the board's decision making process. The board should reflect on:
  - a. What board policy/policies address this issue?
  - b. Is the Student/Staff Handbook applicable?
  - c. Does the Charter Contract address this matter?
  - d. Does this involve the ESP Agreement?

- **The board conducts an annual board self-assessment** and uses the results as a springboard for professional development and board member recruitment.
  - a. What are the strengths?
  - b. What areas of responsibilities need improvement?
  - c. Does each member feel included, valued, and engaged?
  - d. Does the board have a balanced mix of skills and expertise?
  
- **School boards and individual board members actively engage in professional development opportunities** to expand and enhance their governance knowledge and skills with the aim for continuous improvement.
  
- **The board conducts an annual formal assessment of the ESP and uses the results to drive a continuous plan of improvement.**
  - a. How well does the ESP support the school in achieving its academic performance goals?
  - b. How effective is the ESP in managing the school budget?
  - c. How well does the ESP manage the school's operational needs?
  - d. How well does the ESP comply with all laws and Charter Contract requirements?



## Michigan Charter Schools Questions and Answers

<b>GENERAL</b> .....	1
<b>STARTING A CHARTER SCHOOL</b> .....	2
<b>WORKING WITH AN AUTHORIZER</b> .....	3
<b>EDUCATIONAL PROGRAM/SUPPORT SERVICES</b> .....	4
<b>ENROLLMENT</b> .....	5
<b>FACILITIES</b> .....	6
<b>FINANCE</b> .....	7
<b>PROBLEMS/CONCERNS</b> .....	8
<b>START-UP FUNDING</b> .....	9
<b>STAFFING</b> .....	10
<b>AUTHORIZERS</b> .....	10
<b>SERVICE PROVIDERS</b> .....	12
<b>CHARTER SCHOOL BOARDS</b> .....	13
<b>SPECIAL EDUCATION</b> .....	14

### GENERAL

#### 1. What is a Public School Academy (PSA)?

Pursuant to the Revised School Code (MCL), also known as [Public Act 451 of 1976](#), a PSA is a state-supported public school under the state constitution, operating under a charter contract issued by a public authorizing body [[MCL 380.501\(1\)](#), [MCL 380.552](#)]. PSAs are also commonly referred to as charter schools.

Charter schools may include grades K-12 or any combination of those grades. They may not charge tuition and must serve anyone who applies to attend up to enrollment capacity; that is, they may not screen out students based on race, religion, gender, or test scores. Students are selected randomly for admission if the number of students applying exceeds the school's enrollment capacity [[MCL 380.504\(2\)](#)]. The [Every Student Succeeds Act \(ESSA\)](#) eliminates the Highly Qualified Teacher (HQT) provision and reverts to state standards. Michigan requires all charter school educators to be certified. Charter school students are assessed annually as part of the [Michigan Student Test of Educational Progress \(M-STEP\)](#). Charter schools are required to administer other state-mandated assessments such as the Michigan Merit Exam (MME) and Access for ELs, [WIDA ACCESS 2.0](#). Charter schools cannot be religiously affiliated [[MCL 380.502\(1\)](#)].

#### 2. What laws govern the establishment and operation of a Michigan charter school?

Part 6A of Michigan's Revised School Code was adopted to allow for establishing PSAs in Michigan (MCL 380.501 et seq). Following this change, three additional sections of the law were added to provide for the establishment of three different categories of charter schools:

- Urban High School Academies (UHSAs) chartered under [MCL 380.521 – 380.529](#), commonly referenced as Part 6C of the Revised School Code. These schools can only be authorized by state public universities.
- Schools of Excellence (SOEs) chartered under [MCL 380.551 -380.561](#), commonly referred to as Part 6E of the Revised School Code. Schools of Excellence are established as either (1) a replication of a high-performing school, (2) a cyber school, or (3) a conversion of a 6A PSA based on criteria that define superior academic performance.
- Strict Discipline Academies (SDAs) chartered under the Revised School Code ([MCL 380.1311b – 380.1311m](#)). SDAs are established to serve suspended, expelled, or incarcerated young people.

In December 2011, the state legislature passed Public Act 277, which contained numerous amendments to sections 6A, 6C, and 6E. Collectively, PSAs, UHSAs, SOEs, and SDAs are called charter schools throughout the remainder of this document. While UHSAs and SDAs are defined as charter schools under certain sections of Michigan law, these entities have some unique statutory features. Individuals and organizations interested in developing schools in these three categories should review the documents available at the [MDE Public School Academies Unit website](#) or email [MDEPSAGrant@michigan.gov](mailto:MDEPSAGrant@michigan.gov) with specific questions.

## **STARTING A CHARTER SCHOOL**

### **3. Who may apply for a charter?**

Any parent, teacher, group, or entity may apply for a charter as developers. They must apply to LARA and have a non-profit status.

### **4. What steps are needed to start a charter school?**

A charter school must be chartered by the governing board of a public body that is authorized to issue charter contracts pursuant to Michigan law. In Michigan, an “authorizing body” means any of the following, pursuant to [MCL 380.501\(1\)](#):

- State Public University
- Community College
- K-12 Local Education Agency (Traditional School District)
- Intermediate School District (ISD)
- Two or more of these public agencies exercising power, privilege, or authority jointly pursuant to an interlocal agreement

However, not all potential authorizers take advantage of the opportunity to issue charters. The list of authorizers of current authorizers is located at the MDE PSA unit website ([www.michigan.gov/charters](http://www.michigan.gov/charters)) under the [Maps and Lists of Public School Academies’ Link](#).

The fact that not all eligible entities choose to authorize does not preclude charter school developers from requesting consideration from any potential authorizer. At one time, a cap was imposed on the number of charter schools that state public universities could authorize. This cap expired on December 31, 2014. The only remaining caps on establishing charter schools apply to cyber schools and their authorizers.

Interested developers should review and become familiar with all the materials on the MDE PSA website before embarking on the charter school development journey at [www.michigan.gov/charters](http://www.michigan.gov/charters).

5. **How are charter schools funded?** All charter schools are funded through the State School Aid Act [1979 PA 94, as amended, [MCL 388.1606\(6\)\(c\)](#)]. A charter school receives funding through the per-pupil base foundation. By law, this amount may not exceed the per-pupil base foundation received by the local school district where the charter school is geographically located [1979 PA 94, as amended, [MCL 388.1620\(6\)](#)].

6. **Does a charter school qualify for state and federal grant funds in the same manner as a local school district?**

Yes, a charter school may access state and federal grants in the same manner as local school districts [[MCL 380.504a\(f\)](#)]. Various factors apply to the eligibility of charter schools and school districts to apply for grants.

7. **May private schools become charter schools?**

Private schools may become charter schools only if they cease operating as a private entity, obtain a charter from a qualified authorizer, and re-open as a public school that meets all state law requirements.

8. **May a charter school be religiously affiliated?**

No. A charter school must maintain the separation of church and state. If a charter school is utilizing a building that has religious symbols present, they **must** be removed or covered [[MCL 380.502\(1\)](#)].

## WORKING WITH AN AUTHORIZER

9. **Which authorizers are accepting charter applications?**

To determine which authorizers are accepting charter applications, begin with an analysis of where the proposed charter school will be located. There are multiple eligible authorizers that a development team may engage with. Local school districts, intermediate school districts, and community colleges can issue charter school contracts within their geographic boundaries.

The University authorizers and Bay Mills Community College can issue charters anywhere within the State of Michigan.

10. **How does a developer apply for a charter?**

Each Michigan authorizer has its process, forms, and requirements. However, the [Michigan Council of Charter School Authorizers \(MCCSA\)](#) has developed a common Phase I charter application that can help developers plan for the types of questions they will be asked. For a list of current authorizers, see [Map and Lists of Public School Academies](#) and navigate to [Resources for Authorizers](#) for the contract checklist.

## **EDUCATIONAL PROGRAM/SUPPORT SERVICES**

### **11. Are charter schools required to adopt core content standards?**

Local education agencies and public school academies are required to adopt a model core curriculum per [MCL 380.1278](#) of the Revised School Code. The curriculum

should follow the [Michigan Merit Curriculum](#). Various sections of the Revised School Code require that the written curriculum be part of the charter contract. [[MCL 380.502\(3\)\(e\)\(ii\)](#), [MCL 380.522\(4\)\(e\)\(ii\)](#), [MCL 380.552\(7\)\(e\)\(ii\)](#), [MCL 380.1311b et seq: MCL 380.1311d\(3\)\(e\)\(ii\)](#); [MCL 380.1311e\(5\)\(d\)](#)]

### **12. May a charter school offer a single-gender program?**

A charter school may offer a single-gender class or program in which enrollment is limited to pupils of a single gender if the charter school permits enrollment of students of both genders. The charter school must also make available to pupils a substantially equal coeducational class or program and a substantially equal class or program for pupils of the other gender or both genders. Also, participation in a single-gender school, class, or program must be voluntary [[MCL 380.475](#) and [MCL 380.1146](#)]. In short, a single-gender program may be offered if the two other programs (single-gender for the opposite gender and coeducational) are also available and of equal scope and quality.

Charter schools that pursue a single-gender program are advised to work very closely with legal counsel to determine that all aspects of the program are handled appropriately.

### **13. May charter schools be granted waivers for rules and regulations?**

Waivers may be requested for sections of law or rule where the Superintendent of Public Instruction has the legal authority to grant such a waiver. An example of such authority is a waiver for a school year to start after Labor Day. Also, some MDE offices have waiver programs for administrative fees related to their areas of specialty (For example, Food and Nutrition Services). For more information, see MDE's [Food & Nutrition Programs](#) and the [Office of Financial Management's guidance on waivers](#).

### **14. Who provides transportation to a charter school?**

In general, a charter school is considered a local school district. It is responsible for following the same legislative guidelines for transporting students as a local traditional school district, except charter schools are not considered districts under [MCL 380.1321](#), as they have no resident students. Therefore, a charter school may charge for transportation, contract with a 3<sup>rd</sup> party vendor who charges for this service, or opt out of providing transportation. For further information on transportation issues, visit [MDE Pupil Transportation](#).

### **15. Does a charter school have to use certified teachers?**

Certification requirements for charter school teachers are identical to those of local school district teachers. Special exceptions are made for a charter school authorized by a state public university or community college that may wish to use its staff or adjunct professors to teach charter school students. (Refer to [MCL 380.505](#)).

**16. Are charter schools required to report immunization regarding their students? If so, how?**

Charter schools are required to report immunizations. If the charter school is new, it **must** report on **all** students. If the charter school has been open for more than a year, it must report only on the **newly enrolled pupils**. For more information on this topic, please visit [School Health Services](#).

**17. Do charter schools have to offer instruction in health and sex education?**

Charter schools are bound by the same statutory curricular requirements as any traditional school district. Those regulations are found in various sections of the [School State Aid](#).

**ENROLLMENT**

**18. May a charter school be selective in its admissions policy?**

Except as prescribed in law, a charter school may **not** be selective in its enrollment process. It may not screen out students based on disability, race, religion, gender, test scores, etc. It may predetermine the ages, grades, and number of students it will serve. A random selection process (lottery) must be used if the number of applicants exceeds the school's enrollment capacity.

**19. If a student is enrolled in a charter school during a school year, does the student have to be part of the random selection if the charter school exceeds its enrollment number the following school year?**

No, a student is automatically granted enrollment privileges for succeeding school years. Siblings of admitted students are granted enrollment priority, and children of school employees and board members may be offered enrollment priority.

**20. If a student voluntarily leaves a charter school, must the student's resident school district enroll the student?**

Yes, except if the student was in an expulsion due to possession of weapons, committing arson, or criminal sexual conduct in a school building or on school grounds, as outlined in the Revised School Code, [MCL 380.1311](#). Expulsions should be handled on an individual basis.

**21. If a student is seeking enrollment in a charter school, must the charter school enroll the student?**

Yes, with a couple of notable exceptions. A charter school may deny enrollment if the charter reaches its enrollment capacity for that student's age or grade or the school's total enrollment cap as established by the charter contract. It may also deny enrollment if School Board policy stipulates that the school can no longer accept enrollment applications for the current year or if the student has been expelled from their previous district.

**22. Does a charter school have to enroll a student who has been expelled from another district?**

A PSA, UHSA, and SOE are not required to accept the expelled student. The school may choose to enroll a student expelled from their resident district only if the student was not expelled under the mandatory expulsions sections described below. In the case of SDAs, the acceptance of expelled or adjudicated students is central to the school's purpose.

It is important to note that Michigan law does provide for permanent expulsion under certain circumstances. Unless the school district operates or participates in an alternative education program appropriate for a student expelled pursuant to [MCL 380.1311\(2\)](#) and at the school district's discretion admits the student to that program or a "strict discipline academy," the student is expelled from all Michigan public schools. The student cannot be enrolled unless reinstated pursuant to the provisions discussed below [[MCL 380.1311\(2\)](#)].

A program operated for expelled students must ensure that a student is physically separated at all times during the school day from the general pupil population. A student who has been suspended or expelled from their resident district for any reason may attend a nonresident alternative education program without the resident district's approval [[MCL 388.1606\(6\)\(h\)](#)]. If the student is not placed in an alternative education program or a "strict discipline academy," the school district may provide or arrange for the intermediate school district to provide the student with appropriate instructional services at home. Homebound services are designed to help students unable to attend school to keep up with their studies [[MCL 388.1709](#)].

The parent or legal guardian is responsible for locating a suitable alternative education program and enrolling their child in a program during the expulsion. For further information regarding alternative education programs available in your area, contact your local or intermediate school district or visit [Educator Services](#).

Please also visit the [Alternatives and Suspensions and Expulsions Toolkit](#) for more guidance.

**23. When a student transfers from one school to another, how are their records handled?**

Michigan law requires that within 14 days after enrolling a transfer student, the school shall request the student's record, including any Individualized Educational Plan (IEP) for a special education pupil, in writing from the previous school ([MCL 380.1135](#)). The previous school has up to 30 days to comply. All Michigan schools have been advised that they should have procedures in place to facilitate these transfers.

**FACILITIES**

**24. What requirements are in place for charter school facilities?**

Michigan law requires that any school operating in the state have a valid Certificate of Occupancy and make available to the public all health and safety reports regarding school facilities. Failure to obtain necessary inspections and obtain this certificate results in a potential withholding of State Aid.

Information about the requirements and procedures for obtaining a Certificate of Occupancy is maintained at the [Bureau of Licensing and Regulatory Affairs \(LARA\)](#). Please feel free to contact [corpsail@michigan.gov](mailto:corpsail@michigan.gov) with specific questions.

**25. Are resources available to support charter schools with their facilities costs?**

Property occupied by a public school academy and used exclusively for educational purposes is exempt from some real and personal property taxes.

The [Michigan Public Educational Facilities Authority](#) is dedicated to providing opportunities for low-cost financing and technical assistance for qualified public educational facilities and public school academies through its bonding and loan programs. Please call (517) 335-0994 to learn more.

**FINANCE**

**26. Can a charter school charge tuition?**

Unlike traditional school districts, a charter school may **not** charge tuition. Charter schools are, by statute, free and open to all Michigan residents.

**27. Must all state and federal education dollars be sent directly to the authorizing body of the charter school?**

No. The law requires only those payments under the State School Aid Act be sent directly to the authorizing bodies. A charter school may receive federal grant funds directly from the Michigan Department of Education by following the same procedures that traditional school districts are required to follow.

**28. Is a charter school considered a constituent district in intermediate school districts for purposes of area vocational/career and technical education millage, and do charter school students have access to the programs and services provided with those funds?**

Yes, just as with any other traditional school district located in the intermediate school district. Services funded through vocational/career and technical education millage dollars must be allocated to a charter school on the same proportional basis used for other constituent districts. The program must meet the necessary guidelines and be approved by the [Office of Career and Technical Education](#). Please call (517) 241-5342 with specific questions.

**29. What are the common responsibilities of charter schools to the Michigan Department of Education (MDE) as they relate to financial reporting?**

- Charter schools are required to follow a common fiscal year. That year begins July 1 and ends June 30 of the following calendar year ([MCL 380.1133](#)).
- Charter schools are required to follow accepted accounting principles for governmental entities. The [Michigan School Accounting Manual](#) addresses many of these principles and should be referenced. Specific questions related to school accounting issues may be directed to the [Office of State Aid and School Finance](#).

- Charter schools are required to follow a uniform chart of accounts. The chart of accounts is found in the [Michigan Public School Accounting Manual](#). [MCL 380.1281](#) of the Revised School Code requires the Michigan Department of Education to.
  - “Prescribe appropriate uniform pupil and finance accounting records for use in school districts, public school academies, and intermediate school districts and promulgate rules for their adoption.”
- Charter schools are to submit an annual comprehensive financial report into the Financial Information Database (FID) maintained by the Center for Educational Performance and Information (CEPI) using the chart of accounts prescribed in the Michigan School Accounting Manual. The report is submitted electronically and filed with MDE by November 15 each year. The penalty for noncompliance is the **withholding** of state school aid payments. See [MCL 388.1618\(2\)](#) and [MCL 388.1618\(5\)](#) of the State School Aid Act.
- Charter schools are required to have an independent audit of their financial accounting records conducted at least annually by a certified public accountant. The audit reports are filed with MDE no later than November 15 of each year. Guidance for the audit is given in the Michigan School Auditing Manual. The penalty for noncompliance is the withholding of state school aid payments. See [MCL 388.1618\(2\)](#) and [MCL 388.1618\(5\)](#) of the State School Aid Act.
- All charter school financial audits are subject to Government Auditing Standards (GAS). The book describing the standards is available online. Please visit [Government Auditing Standards](#).
- Charter school boards shall adopt a budget before the commencement of the fiscal year, using the minimum levels of appropriation described in [Section IV of the Michigan School Accounting Manual](#).
- Charter schools are not to adopt or operate under a “deficit budget” (State School Aid Act, [MCL 388.1702](#). MDE closely monitors entities that violate this statute). In the event a charter school falls into a deficit, they are required to file a deficit elimination plan and post it with the transparency items under “the mitten.” Deficit elimination plans are approved and monitored by the Financial Management Office within MDE. Please visit [Deficit District Information](#) for more information. It is important to note that fiscal viability is one of the criteria for reauthorization, and their authorizer may close schools that run a deficit.
- Charter schools should always seek competent, independent legal counsel before entering into any binding legal or borrowing agreement.
- Charter schools must provide the same transparency information on their website that all public schools provide [[MCL 388.1618\(2\)](#) and [MCL 380.503\(6\)\(m\)](#)].

## PROBLEMS/CONCERNS

### 30. What is the chain of accountability to be used if a problem is identified at the academy?

The school should have in place a parent/student handbook that may address the issue. If not, the protocol for raising issues and concerns is, to begin with, the teacher, then the principal, then the superintendent (if applicable), and then the board of directors of the academy. It is important to allow the school and its

leadership to correct the problem first. If the problem or concern continues after discussing it at the school level, the next step is to contact the school's authorizer.

**31. What question should a parent ask a charter school representative before choosing to send a child to that school?**

All charter schools are different, even if they use the same curriculum. Visit the school and ask questions about the school's educational program, leadership (governing board and administration), faculty, and policies. Most schools will provide a Parent/Student Handbook, which includes general information.

Important information can be found at the [MiSchoolData Parent Dashboard](#) regarding school services and offerings, student data, staff data, and various performance data metrics.

**32. Can a charter school require uniforms?**

A PSA is permitted to establish a standardized dress code for students. The PSA board should have policies indicating the requirements, and they should be accessible to families at enrollment. Such dress code requirements may apply to the regular school day, extracurricular activities, and special events (e.g., prom or graduation). However, dress codes should be reasonable in scope and related to the school's interests.

- If the school district requires a specific color, style, and manufacturer, then the school district must supply the item free of charge.
- Special clothing (no robes or band uniforms) for extracurricular activities such as choir, band, or orchestra may be supplied or paid for by the school district. Example: For choir, a white blouse or shirt, dark trousers or skirt, and black shoes and stockings.

**33. Can a charter school charge parents who do not pick up students on time after school?**

This is a local issue to be decided by each school and formalized in a written board policy. It is recommended that school boards that choose to adopt such policies consult their attorneys to ensure adequate notice and information is provided to students and parents, perhaps through publication in the school's student handbook.

**START-UP FUNDING**

**34. Are there federal charter school dollars to help start an academy?**

As of September 2023, there are no federal start-up grants available in the State of Michigan. However, private funders such as the Walton Foundation may have funds available. Typically, charter advocacy organizations such as the [Michigan Association of Public School Academies \(MAPSA\)](#) can provide information on startup funding.

## STAFFING

### **35. Are employees of an outside company who are providing instructional services to charter school students members of the Michigan Public School Employees' Retirement System (MPSERS) and local union?**

Attorney General Opinion No. 6915 (1996) addressed two issues:

- a. whether charter schools are subject to [MCL 380.1231](#) of the Revised School Code, requiring the board of a school district to "hire and contract with qualified teachers"; and
- b. whether employees of an outside company who are providing instructional services to charter school students are members of MPSERS.

Although instruction in charter schools is to be provided by certificated teachers, pursuant to this opinion, charter schools may contract with outside companies for the provision of instructional services. Teachers who are providing instructional services to students at a charter school, who are employed by an outside company rather than by the charter school, are not members of MPSERS.

In December 2011, Public Act 277 removed the requirement that school districts authorizing a PSA must cover PSA staff under that district's current collective bargaining agreements.

### **36. How does employment as a teacher in a Michigan charter school affect that teacher's college Perkins loan?**

A teacher who works in the education field may apply for loan forgiveness. Forgiveness is processed at the school or student loan servicer level. Contact those entities to verify eligibility. A Michigan charter school is a public school, and teachers may qualify for loan forgiveness.

## AUTHORIZERS

### **37. What are the major responsibilities of an authorizing body?**

Pursuant to [MCL 380.502\(4\)](#): "An authorizing body shall oversee, or shall contract with an intermediate school district, community college, or state public university to oversee, each public school academy operating under a contract issued by the authorizing body. The authorizing body is responsible for overseeing compliance by the board of directors with the contract and all applicable law."<sup>1</sup> These oversight duties include:

---

<sup>1</sup> "If the superintendent of public instruction finds that an authorizing body is not engaging in appropriate continuing oversight of 1 or more public school academies operating under a contract issued by the authorizing body, the superintendent of public instruction shall suspend the power of the authorizing body to issue new contracts to organize and operate public school academies. A contract issued by the authorizing body during the suspension is void. A contract issued by the authorizing body before the suspension is not affected by the suspension." [[MCL 380.502\(5\)](#)]

- Thoroughly reviewing the applicant’s educational plan. The plan must address the educational needs of the students, curriculum goals and objectives, teaching methods, and student assessment;<sup>2</sup>
- Determining if all fire, safety, and health codes are met;
- Developing a description of the methods used to monitor the charter school’s compliance with applicable law and its performance in meeting its targeted educational objectives. Authorizers must implement a corrective plan of action for their schools that do not meet those standards;
- Ensure charter school boards operate independently of any educational management company involved in the operation of the school;
- Developing a description of the process for amending the contract during the term of the contract;
- Setting and enforcing the terms of the authorizing contract, including adopting a resolution establishing the method of selection, length of term, and the number of members of the board of directors of the charter school. Authorizers must also ensure the local community is represented on the board and that all board members are US citizens
- Within ten days after issuing a charter school contract, a charter school contract must be submitted to the Superintendent of Public Instruction.
  - A contract with a charter school may be revoked by the authorizing body if one or more of the following occurs:
    - failure of the charter school to demonstrate improved academic achievement for all groups of pupils or meet the educational goals outlined in the contract
    - failure of the charter school to comply with applicable law
    - failure of the charter school to meet accepted public sector accounting principles and demonstrate sound fiscal stewardship
    - or other grounds for revocation specified in the contract.

Additional powers granted to authorized bodies in the [MCL 380.507](#) include acting as fiscal agent for the charter school—the state school aid payment for the charter school is paid to the authorizing body that is the fiscal agent for the charter school, which then forwards the payment, up to a maximum of 3 percent, to the charter school.

**38. If a school district, intermediate school district, or community college is interested in becoming an authorizer, what action steps are needed?**

No formal MDE filing or approval is required for an organization to become an authorizer. Pursuant to [MCL 380.502\(3\)](#), the organization must notify MDE of its actions and provide copies of the charter application and contract to the Superintendent of Public Instruction within ten (10) days of approval.

It is advisable for an eligible organization considering becoming an authorizer to weigh all aspects of this decision carefully. A wide array of resources and insights are available. Visit [www.michigan.gov/charters](http://www.michigan.gov/charters) to learn more, or call MDE at (517) 373-4631 with specific questions after reviewing available online resources.

**39. How do authorizers decide which schools to authorize?**

In deciding whether to issue a contract for a proposed public school academy, the authorizing body is required to consider:

---

<sup>2</sup> The Revised School Code states, “... to the extent applicable, the progress of the pupils in the public school academy must be assessed using both the mathematics and reading portions of the Michigan student test of educational progress (M-STEP) or the Michigan merit examination under section 1279g, as applicable.” [\[MCL 380.502\(3\)\(e\)\(ii\)\]](#)

- The resources available for the proposed academy;
- The population to be served by the proposed academy;
- The education goals to be achieved by the proposed academy;
- The applicant’s track record, if any, in organizing public school academies;
- The graduation rate of a school district in which the proposed academy is proposed to be located;
- The population of a county in which the proposed public school academy is proposed to be located;
- The number of schools in the proximity of a proposed location of the proposed public school academy that is identified as among the lowest achieving 5% of all public schools in the state;
- The number of pupils on waiting lists of public school academies in the proximity of the proposed location of the Academy.

Also, authorizer decisions related to contract renewal must include increases in student academic achievement for all groups of pupils as “the most important” factor. [[MCL 380.503\(6\)\(h\)](#)].

## **SERVICE PROVIDERS**

### **40. What does an education service provider (also known as an ESP or management company) do for a school?**

Michigan law permits charter school boards to contract with service providers/management companies for various school staffing and support functions, which may include facility management, personnel management, payroll and accounting, curriculum development, and professional development services for staff and teachers. Roughly four out of five charter schools in Michigan have contracted with a service provider.

Each charter school/service provider agreement is unique. Some charter school boards contract for only one or two services, such as human resources or accounting, whereas others choose to contract for all day-to-day staff functions. The variation in service provider/management company arrangements is broad and difficult to quantify. Some service providers/management companies work with only one charter school, while others contract with multiple charter schools in Michigan and across the country. Some act in only a limited capacity, while others offer complete “turnkey” operations. This widely varied approach to charter school contracting has allowed for the creation of a diverse service provider/management company marketplace in Michigan.

Service providers/management companies are accountable to the non-profit charter school boards that hire them. The boards are responsible for setting policy, directing operational and academic performance, and ensuring fiscal stability. Regardless of the type or level of support for which it is contracted, each service provider/management company operates under the direction of the charter school board.

#### **41. How accountable are service providers/management companies in Michigan?**

Many service provider/management company spending aspects are already reported through their schools' data submissions to the state. Michigan's Center for Educational Performance and Information (CEPI) maintains academic, personnel, and financial information about each service provider-managed school, just as it does for all other schools.

Charter schools are required to report salaries of staff who work at the school, even if they are employed by a 3<sup>rd</sup> party. Additionally, service providers/management companies are vendors hired and overseen by the charter school board through a performance agreement, often referred to as a management contract.

No current statutes specify requirements for contracts between PSA boards and the management companies they hire. However, best practice dictates that management contracts should contain specific performance targets aligned to the goals (and other provisions) in the charter contract. Charter school boards should hold all vendors, including service providers/management companies, accountable for the services they provide.

### **CHARTER SCHOOL BOARDS**

#### **42. How are charter school board members appointed?**

Charter school board members are public officials who have sworn a constitutional oath of office in Michigan. Each board member undergoes a selection and appointment process established by the charter school's authorizer before being named by the authorizer's governing board. Boards must have representation from the local community, and board members must be citizens of the United States.

Some concerns have been raised about whether or not service providers/management companies in Michigan can name their governing boards and thus exercise some undue level of influence or control over these boards once a school is established. While Michigan law permits the developer of a new charter school to name the members of an initial governing board, it is up to the authorizer to ensure that those board members are qualified, independent voices on behalf of the charter schools they serve.

To ensure procedural consistency across Michigan's authorizing community, the [Michigan Council of Charter School Authorizers \(MCCSA\)](#) has adopted [standards for this selection and appointment process](#). At a minimum, these standards presume written application for a board appointment, criminal records check, and a personal interview.

The standards also discuss potential conflict of interest issues and recommend the use of a disclosure form be completed by charter school board members on an annual basis. These procedures are designed to ensure board member quality and autonomy and prevent inappropriate charter school board member/service provider relationships. Visit the [Michigan Council of Charter School Authorizers \(MCCSA\)](#) to learn more.

**43. Can the board and/or staff of a school be family members or otherwise closely related to members of the board?**

No. The December 2011 amendment to the Revised School Code requires the academy board to prohibit specified family relationships among board members, individuals who have an ownership interest in or who are officers or employees of an ESP involved in the academy's operation and employees of the academy. The potential for or existence of conflicts of interest among board members are items that are carefully monitored by Michigan authorizers.

As mentioned, MCCSA oversight and accountability standards recommend the use of a disclosure form be completed by charter school board members on an annual basis. These procedures are designed to ensure board member quality and autonomy and prevent inappropriate charter school board member/service provider relationships. Visit the [Michigan Council of Charter School Authorizers \(MCCSA\)](#) to learn more.

**SPECIAL EDUCATION**

**44. What options may a charter school use to meet its responsibilities to provide a free appropriate public education, as required by state and federal law, to a student with a disability?**

As provided in [MCL380.1751](#) of the Revised School Code:

The board of a local school district [or charter school] shall provide special education programs and services designed to meet the individual needs of each student with a disability in its district on record under section 1711 for whom an appropriate educational or training program can be provided by the intermediate school district special education plan, in either of the following ways or a combination thereof:

- a. Operate the special education program or service.
- b. Contract with its intermediate school board, another local school district board, and adjacent school district board in a bordering state, the Michigan Schools for the Deaf and the Blind, or the Department of Health and Human Services or with an agency approved by the superintendent of public instruction. The intermediate school district where the local school district [or charter school] is located shall be a party to each contract, even if the intermediate school district does not participate in the delivery of the program or services.

Pursuant to Attorney General Opinion No. 6915 (1996), charter schools are not required directly to employ teachers. Instruction at charter schools is to be provided by certificated teachers (exception-refer to Section 380.505) however; charter schools may contract with outside companies for the provision of instructional services. Therefore, "a public school academy is not subject to Section 380.1231 of the Revised School Code, which requires the board of a school district to 'hire and contract with qualified teachers' and it may contract with an outside company for the provision of instructional services by employees of that company."

In addition to the methods listed above, a charter school may contract with an agency approved by the State Board of Education for the delivery of ancillary or related professional education services.

**45. If a charter school chooses to hire staff or contract with a private agency for “services,” is the charter school entitled to apply for reimbursement under the State School Aid Act ([MCL 388.1651a](#), special education funding) and the intermediate school district special education millage?**

Yes. A charter school is considered to be a local school district under [MCL 388.1603\(5\)](#) of the State School Aid Act. It is considered a local district to be included in the intermediate school district plan for special education programs and services. Therefore, charter schools have the same right to participate in state school aid and intermediate school district special education funding as any other local school district, by the provisions to the intermediate school district plan for special education programs and services.

**46. If a charter school is entitled to intermediate school district special education millage funds, is the charter school held to the same limitations as other local districts, i.e., the cap on student-staff ratio used for certain categories of programming?**

Yes. For purposes of special education services, a charter school is bound to the same requirements as other local constituent districts served by their respective intermediate school districts. The charter school, like any other constituent district, must be recognized in its respective intermediate school district plan for special education programs and services to participate.

**47. Is a charter school eligible for Individuals with Disabilities Education Act funds?**

Yes. Federal special education funds under the Individuals with Disabilities Education Act (IDEA) are granted to the intermediate school districts. These funds are distributed to constituent local school districts according to the intermediate school district plan for special education programs and services, which must comply with state and federal regulations controlling the use and distribution of the funds. The intermediate school district plan for special education programs and services is developed cooperatively with local constituent school districts, including charter schools.

**48. If a charter school is eligible for intermediate school district special education millage and Individuals with Disabilities Education Act Funds, must a charter school follow the same requirements as other local educational agencies for obtaining funds, e.g., the filing of forms and applications?**

Yes. A charter school must follow the same requirements as other local educational agencies. Both state and federal funds are appropriated under Article 5 of the State School Aid Act of 1979, *as amended*, [MCL 388.1651a et seq.](#)

- Article 5 of the State School Aid Act indicates the funds may be used to reimburse districts and intermediate school districts for special education programs, services, and special education personnel.
- Article 5 of the State School Aid Act allocates funds for:

- i. Special education programs and services as defined in Article 3 of the [MCL 380.1701, et seq.](#)
  - ii. A total of salaries and other compensation paid to approved special education personnel. Michigan Administrative Rules for Special Education (MARSE) Rules 340.1771 through 340.1799g provide personnel approval criteria.
- [MCL 388.1658](#) of the State School Aid Act, allocates funds to districts and intermediate districts for providing specialized transportation services, as determined by MDE, for pupils in special education programs and services. Specialized transportation services are defined in Rule 388.371 of the Michigan Administrative Code Rules governing State Aid for Transportation of School Children.

**49. Must a charter school adhere to all provisions of IDEA, the Michigan Revised Administrative Rules for Special Education (MARSE), the Family Education Rights and Privacy Act (FERPA), and other state and federal statutes?**

Yes. The IDEA considers the entire state. If the state (as a whole) receives federal funds, then all entities of the public education system are responsible for complying with IDEA provisions, including ensuring that each eligible child with a disability is provided a "free appropriate public education." Michigan complies with the IDEA in its implementing regulations. A charter school is required to adhere to Michigan statutes and rules for special education, as well as the federal requirements.

The Family Education Rights and Privacy Act (34 CFR Part 99) (FERPA) has broader applicability than special education; it applies to all public educational entities and their students, whether or not special education is at issue. The purpose of FERPA is to protect the confidentiality of student educational records. FERPA is a federal law that affords parents the right to have access to their children's education records, the right to seek to have the records amended, and the right to have some control over the disclosure of information from the records. Educational institutions shall not release educational records to non-school employees without the parents'. FERPA does permit schools to work with juvenile justice system agencies. Failure of an educational agency or institution to comply with FERPA can result in loss of federal funding.

Section 504 of the Rehabilitation Act of 1973, *as amended*, P.L. 93-112, requires that "no qualified handicapped person shall, by handicap, be excluded from participation in, be denied the benefits from Federal financial assistance...." The Office for Civil Rights of the U.S. Department of Education enforces the law prohibiting specific discriminatory activities. The law applies to elementary and secondary, as well as postsecondary schools. The Act was reauthorized in 1998 with amendments and added links to the Workforce Investment Partnership Act of 1998. The Rehabilitation Act Amendments of 1998 included extensive links between vocational rehabilitation agencies and state workforce systems.

Section 504 also includes "hidden disabilities," such as physical and mental impairments that are not clear to others (i.e., learning disabilities, diabetes, epilepsy, heart disease, and chronic illness).

**50. Is the intermediate school district required to monitor special education programs and services?**

Yes. A charter school is identified in statute as a local public school district and has the same rights and responsibilities as any other school district. MDE is required to monitor local and intermediate school districts for compliance with the IDEA and with Michigan's Administrative Rules for Special Education. This activity includes a charter school.

The intermediate school districts are an integral part of the monitoring process. As such, intermediate school districts must monitor a charter school to ensure their compliance with pertinent special education requirements.

**51. To what extent is an intermediate school district responsible for charter schools serving pupils whose parents reside outside the intermediate school district where the charter school is located?**

For special education purposes, the charter school is a constituent district of the intermediate school district in which it is located. The intermediate school district has the same responsibility to the charter school as it does to any other constituent district. It is not unusual for a public school district to serve pupils from other districts, including pupils whose parents live in another intermediate school district. The intermediate school district has the same obligation to pupils whose parents live elsewhere as it does to any other pupil legally enrolled by a constituent district.

Section 51a (14) of the State School Aid Act ([MCL 388.1651a\(14\)](#)) further clarifies:

(14) If a public school academy that is not a cyber school, as that term is defined in section 551 of the revised school code, MCL 380.551, enrolls under this section a pupil who resides outside of the intermediate district in which the public school academy is located and who is eligible for special education programs and services according to statute or rule, or who is a child with a disability, as that term is defined under the individuals with disabilities education act, Public Law 108-446, the intermediate district in which the public school academy is located and the public school academy shall enter into a written agreement with the intermediate district in which the pupil resides for the purpose of providing the pupil with a free appropriate public education, and the written agreement must include at least an agreement on the responsibility for the payment of the added costs of special education programs and services for the pupil. If the public school academy that enrolls the pupil does not enter into an agreement under this subsection, the public school academy shall not charge the pupil's resident intermediate district or the intermediate district in which the public school academy is located the added costs of special education programs and services for the pupil, and the public school academy is not eligible for any payouts based on the funding formula outlined in the resident or nonresident intermediate district's plan. If a pupil is not enrolled in a public school academy under this subsection, the provision of special education programs and services and the payment of the added costs of special education programs and services for a pupil described in this subsection are the responsibility of the district and intermediate district in which the pupil resides.

**52. Is there a need to certify charter school students for special education services and identify them as such on the enrollment count if the charter school is not planning to claim additional state funding or federal funding?**

If “certify” refers to the process of identifying children who are suspected of having a disability under state or federal law, the response is yes. This is called *Child Find* under the federal regulations. There is a need to complete the “child find” requirements irrespective of application or claim for additional state or federal funding.

The State of Michigan is responsible for ensuring a free and appropriate public education for every student with a disability who is enrolled in its public school system. Since a charter school is a public school, it is bound by the same requirements as other public intermediate and local school districts within the state. The determination of a charter school to seek no state or federal funds related to special education does not exempt it from this obligation.

**53. If a charter school contracts with a private entity to provide speech, psychological, and social work services: (a) must the credentials of the providers be the same as those employed by public schools in general, and (b) must the charter school submit its personnel inventory to the intermediate school district?**

This response is intended to refer only to professional personnel related to “special education programs or services.”

In response to part “(a)” of the question, the answer is yes. Standards are articulated in the Administrative Rules for Special Education and the rules governing different professional specialties.

In response to part “(b)” of the question, to meet federal reporting requirements prerequisite to receipt of federal funds requires reporting information about public school students and professional personnel to the federal government on an annual basis. This information is collected through the Michigan Department of Education’s Registry of Education Personnel (REP). REP data are collected semi-annually in December and June. This process is implemented through the local school districts procedures for data collection. If there are students with individualized education programs enrolled in a charter school, then the information about special education programs or services to those students must be reported as part of the “December One Count” through the Michigan Compliance Information System (MICIS).

For further information regarding special education, you may contact MDE’s [Office of Special Education](#) or call (833) 633-5788.

# FERRIS STATE UNIVERSITY

---

CHARTER SCHOOLS OFFICE



## School Support Protocol



## Table of Contents

<b>The Four Pillars .....</b>	<b>3</b>
Performance Standards .....	3
<b>Pillar 1 – Academic Progress .....</b>	<b>6</b>
Educational Goals and Related Measures .....	6
Academic Indicators for School Support – General Education Academies .....	6
Academic Indicators for School Support – Alternative Education and Strict Discipline Academies .....	11
<b>Pillar 2 – Fiscal Solvency .....</b>	<b>15</b>
Fiscal Indicators for School Support .....	15
Fiscal Support Identifiers .....	18
FSU CSO Standard Fiscal Oversight Model .....	19
<b>Pillar 3 – Operations .....</b>	<b>21</b>
Expectations for Effective Board Meetings .....	21
Board Meeting Evaluation Rubric .....	22
Staff Retention Rates .....	22
School Safety and Security .....	23
Building Culture Observations .....	25
Instructional Practice Indicators .....	25
Climate and Culture Indicators .....	26
Evaluating Overall Operational Effectiveness.....	27
Operations Indicators for School Support .....	27
<b>Pillar 4 – Compliance .....</b>	<b>29</b>
Staff Certification .....	29
Insurance Coverage .....	29
Epicenter On-Time Submission Compliance .....	29
Epicenter Submission Accuracy .....	29
State Non-Compliance Notifications to Authorizer .....	29
Evaluating Overall Compliance Effectiveness .....	30
Compliance Indicators for School Support .....	30
<b>Summary Report .....</b>	<b>32</b>
Summary Report – Academic Section .....	32
Summary Report – Fiscal Section .....	35
Summary Report – Operations and Compliance Section .....	36

## The Four Pillars

The Ferris State University (FSU) Charter Schools Office (CSO) has established a method for evaluating school performance that utilizes four pillars:

1. Academic Progress
2. Fiscal Solvency
3. Operations/Governance
4. Compliance

The CSO uses several support indicators to monitor and assess the performance of the academies that it authorizes. The CSO is guided by the performance standards as described in the National Association of Charter School Authorizers Principles and Standards for Quality Charter School Authorizing.

## Performance Standards

**Performance standards enable schools and authorizers to know the outcomes for which authorizers will hold schools accountable.** They are the basis for school evaluation and should be incorporated into the charter contract. Academic, financial, operational, and compliance performance standards should include clearly defined and measurable indicators, measures, metrics, and targets that:

- **Academic Performance:**
  - Set expectations for student academic achievement status or proficiency, including comparable proficiency
  - Set expectations for student academic growth, including adequacy of growth toward state standards
  - Incorporate state and federal accountability systems, including state grading and/or rating systems
  - Set expectations for postsecondary readiness, including graduation rates for high schools
  - Provide schools with an option to incorporate mission-specific performance measures for which the school has presented valid, reliable, and rigorous means of assessment approved by the authorizer
- **Financial Performance**
  - Enable the authorizer to monitor and evaluate the school's financial stability and viability based on short-term performance
  - Enable the authorizer to monitor and evaluate the school's long-term financial sustainability
  - Define financial management and oversight standards based on generally accepted accounting principles

- **Operational Performance**
  - Define the key design elements of the educational program for which the authorizer will hold the school accountable
  - Hold school governing boards accountable for meeting statutory and board established operating and reporting requirements
  - Ensure school compliance with student and employee rights and obligations
  - Establish expectations related to the school environment, including health and safety, transportation, facilities, and appropriate handling of records
- **Compliance Performance**
  - Enable the authorizer to monitor staff certification and legal documentation required for school employees
  - Ensure school compliance with all required insurance policies and level of coverage
  - Establish on-time expectations for Epicenter submissions
  - Enable the authorizer to monitor the accuracy of Epicenter submissions
  - Ensure school and board compliance with all State and Federal requirements

The support designation in a particular pillar may be adjusted throughout the academic year depending on changing data and fluctuations in the academies’ key support indicators. In all cases, the academy’s Board of Directors shall be apprised of any alterations to the academy’s school color designation by representatives of the CSO.



**Figure 1**

Depending on each individual analysis, academies with either a yellow or red status in any pillar may be required to complete a support plan and will receive the assistance of the CSO school support team in enacting that plan. **It is the goal of the school support team to work with the academy to help resolve the issues indicated. It is not the intent of the CSO to assume the operations or governance of the academy.**

## Academic Tier Levels of Support

The CSO will look at each academy's progress and identify academies for academic support each fall with the most current data available. Due to MDE's release timeline, the School Index data will always be a year behind, in which case, the CSO will take the progress trend into account when assigning Tier levels of support. Each contract goal will be given a designation. The support team will look at the number of "Does Not Meet" designations, School Index trends, and prior academic history to assign a Tier level of support. The chart presented in **Figure 2** will be used as a guideline to start the conversation.

<b>Tier I</b>	No more than 2 (4 w/ HS) "Does Not Meet"
<b>Tier II</b>	3-4 (up to 7 w/ HS) "Does Not Meet"
<b>Tier III</b>	5 (8-10 w/ HS) "Does Not Meet"
<b>Tier IV</b>	6+ (10+ w/ HS) "Does Not Meet" with an ATS, CSI, or Partnership designation.

**Figure 2**

If an Academy is identified as Tier I or Tier II, there are universal supports available.

Academies identified as needing more support (Tier III or Tier IV), the CSO school support team will assist the Academy's leadership team in developing an Academic Monitoring Plan (AMP) that is aligned with their Michigan Continuous Improvement Process (MICIP). The AMP will identify the targets used to show academic growth, which over time, should lead to compliance with the contractual educational goals.

Assigned Academy Tier levels are meant to identify supports needed for academies and not to solely measure if contractual goals were met. Once all academic information (MDE release of the index scores) becomes available, the CSO will evaluate if contractual goals were met and notify academies.

## Pillar 1 – Academic Progress

Ferris monitors pupil academic achievement for all groups of pupils as required by the Revised School Code. Pursuant to the terms and conditions of the contract issued by the FSU Board of Trustees, **a contractual Educational Goals Policy has been created by the CSO**, which is part of the contract and goes into effect thirty (30) days after academy board notification, as stated in the terms and conditions of the contract for all academies being authorized or reauthorized pursuant to contracts issued by the university board.

**Failure by the academy board to comply with the policy may result in the non-issuance of a contract, or, for existing academies, the initiation of suspension, termination, or revocation proceedings under the contract.** This will be taken into consideration when determining reauthorization of an academy upon expiration of the contract.

### Educational Goals and Related Measures

In accordance with the applicable law and the charter contract terms and conditions, **academies must achieve or demonstrate measurable progress toward the achievement of the educational goals identified in the Educational Goals Policy.** Academies will show academic progress by demonstrating measurable academic growth toward achievement and proficiency for all groups of students. Additionally, it is expected that the academy will meet the state of Michigan's academic standards and any improvement targets required to be achieved pursuant to state and federal law.

Academies are also expected to remain off the partnership school list published by the Michigan Department of Education. If the academy already has school buildings identified on this list, it is expected to make the progress necessary to no longer be identified on this list.

Twice a year in a scheduled support meeting, the CSO school support team will use an evaluation of the support indicators to identify the support and interventions necessary to support its schools based upon the specific deficiencies noted in the evaluation.

### Academic Indicators for School Support – General Education Academies

The school support team will utilize the support indicator targets, measures, and rubrics in **Figures 3-4** to evaluate the academic performance of general education academies.

<b>Academic Indicators for School Support- General Education Academies (Grades 2-8)</b>			
<b>Exceeds</b>	"Meets" or "Exceeds" in both overall goals and both index goals and has no more than 2 "Does Not Meet" indicators		
<b>Meets</b>	"Meets" or "Exceeds" in both overall goals and both index goals and has no more than 4 "Does Not Meet" indicators		
<b>Approaching</b>	"Meets" or "Exceeds" 1 overall goal and both index goals and has 5 or more "Does Not Meet" indicators <b>OR</b> has all "Approaching" indicators		
<b>Does Not Meet</b>	Did not meet overall goals and has been labeled as ATS,CSI, or partnership school		
		<b>Measuring State Expectations</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
The academy will have an MDE School Growth Index score of 50 or higher	Is the school meeting state designation expectations as set forth by the state and federal accountability systems in growth?	MiSchool Data Growth Index Score	<b>Exceeds:</b> ≥ 70% <b>Meets:</b> ≥50% but < 70% <b>Approaching:</b> ≥30% but <50% <b>Does Not Meet:</b> < 30%
		<b>Measuring Academic Growth in Reading</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Students will show growth in the 50th percentile or higher on the NWEA reading assessment from fall to spring	Are students making expected annual growth in reading compared to their peers?	Using a weighted average of the number of students per grade and the NWEA SCGP score on the reading Student Growth Report	<b>Exceeds:</b> ≥ 70% <b>Meets:</b> ≥50% but < 70% <b>Approaching:</b> ≥30% but <50% <b>Does Not Meet:</b> < 30%
		<b>Measuring Academic Growth in Math</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Students will show growth in the 50th percentile or higher on the NWEA math assessment from fall to spring	Are students making expected annual growth in math compared to their peers?	Using a weighted average of the number of students per grade and the NWEA SCGP score on the math Student Growth Report	<b>Exceeds:</b> ≥ 70% <b>Meets:</b> ≥50% but < 70% <b>Approaching:</b> ≥30% but <50% <b>Does Not Meet:</b> < 30%
		<b>Measuring Academic Growth-State Assessment</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% growth increase on the math MSTEP/PSAT over time	Are students making sufficient yearly academic growth to increase proficiency in math?	Academies will show a 3% growth increase for "all students" on the MiSchool Data Report	<b>Exceeds:</b> ≥ 6% <b>Meets:</b> ≥3% but < 6% <b>Approaching:</b> ≥1% but < 3% <b>Does Not Meet:</b> < 1%
		<b>Measuring Academic Growth-State Assessment</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% growth increase on the ELA MSTEP/PSAT over time	Are students making sufficient yearly academic growth to increase proficiency in ELA?	Academies will show a 3% growth increase for "all students" on the MiSchool Data Report	<b>Exceeds:</b> ≥ 6% <b>Meets:</b> ≥3% but < 6% <b>Approaching:</b> ≥1% but < 3% <b>Does Not Meet:</b> < 1%

Figure 3

Continued on the following page

**Academic Indicators for School Support – General Education Academies (Grades 2-8) Cont.**

		<b>Measuring State Expectations</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
The academy will have an MDE Index score of 45 or higher	Is the school meeting the state designation expectations as set forth by state and federal accountability systems?	The MiSchool Data Overall Index Score	<b>Exceeds:</b> ≥ 70% <b>Meets:</b> ≥45% but < 70% <b>Approaching:</b> ≥30% but < 45% <b>Does Not Meet:</b> < 30%
		<b>Measuring Grade Level Performance</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
50% of students (grades 2-8 combined) are at the grade level norm on the NWEA reading assessment from fall to spring	Are students achieving proficiency on a nationally normed assessment in reading?	NWEA report stating the percentage of students at grade level using the average national achievement percentile ranking for reading	<b>Exceeds:</b> ≥ 70% <b>Meets:</b> ≥50% but < 70% <b>Approaching:</b> ≥30% but < 50% <b>Does Not Meet:</b> < 30%
		<b>Measuring Grade Level Performance</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
50% of students (grades 2-8 combined) are at the grade level norm on the NWEA math assessment from fall to spring	Are students achieving proficiency on a nationally normed assessment in math?	NWEA report stating the percentage of students at grade level using the average national achievement percentile ranking for math	<b>Exceeds:</b> ≥ 70% <b>Meets:</b> ≥50% but < 70% <b>Approaching:</b> ≥30% but < 50% <b>Does Not Meet:</b> < 30%
		<b>Measuring Grade Level Performance-State Assessment</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% difference on the ELA MSTEP/PSAT compared to the composite district	Are students outperforming students in schools they might otherwise attend (composite) on the ELA grade level state assessment?	Testing scores reported by MiSchool data. Composite resident district will be determined based on pupil enrollment as submitted to CEPI via MSDS in the fall of each academic year	<b>Exceeds:</b> ≥ 10% <b>Meets:</b> ≥3% but < 10% <b>Approaching:</b> ≥1% but < 3% <b>Does Not Meet:</b> 0%
		<b>Measuring Grade Level Performance-State Assessment</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% difference on the math MSTEP/PSAT compared to the composite district	Are students outperforming students in schools they might otherwise attend (composite) on the math grade level state assessment?	Testing scores reported by MiSchool data. Composite resident district will be determined based on pupil enrollment as submitted to CEPI via MSDS in the fall of each academic year	<b>Exceeds:</b> ≥ 10% <b>Meets:</b> ≥3% but < 10% <b>Approaching:</b> ≥1% but < 3% <b>Does Not Meet:</b> 0%

**Figure 3**

<b>Academic Indicators for School Support- General Education Academies (Grades 9-12)</b>			
<b>Exceeds</b>	"Meets" or "Exceeds" in both overall goals and both Index goals and has no more than 2 "Does Not Meet" Indicators		
<b>Meets</b>	"Meets" or "Exceeds" in both overall goals and both Index goals and has no more than 4 "Does Not Meet" Indicators		
<b>Approaching</b>	"Meets" or "Exceeds" 1 overall goal and both Index goals and has 5 or more "Does Not Meet" Indicators or has all "Approaching" Indicators		
<b>Does Not Meet</b>	Did not meet overall goals and has been labeled as an ATS,CSI or partnership school		
		<b>Measuring State Expectations</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% growth increase on the math SAT over time	Are students making sufficient yearly academic growth to increase proficiency in math?	Testing scores reported by MiSchool data	<b>Exceeds:</b> ≥ 6% <b>Meets:</b> ≥3% but < 6% <b>Approaching:</b> ≥1% but <3% <b>Does Not Meet:</b> < 1%
		<b>Measuring State Expectations</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% growth increase on the EBRW SAT over time	Are students making sufficient yearly academic growth to increase proficiency in ELA?	Testing scores reported by MiSchool data	<b>Exceeds:</b> ≥ 6% <b>Meets:</b> ≥3% but < 6% <b>Approaching:</b> ≥1% but < 3% <b>Does Not Meet:</b> < 1%
		<b>Measuring State Expectations</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% difference on the EBRW SAT compared to the composite district	Are students out-performing students in schools they might otherwise attend (composite) on state assessments in reading and writing?	Testing scores reported by MiSchool data. Composite resident district will be determined based on pupil enrollment as submitted to CEPI via MSDS in the fall of each academic year	<b>Exceeds:</b> ≥ 10% <b>Meets:</b> ≥3% but < 10% <b>Approaching:</b> ≥1% but < 3% <b>Does Not Meet:</b> 0%

Figure 4

Continued on the following page

**Academic Indicators for School Support- General Education Academies (Grades 9-12)**

		<b>Measuring Grade Level Performance-State Assessment</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will show a 3% difference on the math SAT compared to the composite district	Are students out-performing students in schools they might otherwise attend (composite) on state assessments in math?	Testing scores reported by MiSchool data. Composite resident district will be determined based on pupil enrollment as submitted to CEPI via MSDS in the fall of each academic year	<b>Exceeds:</b> ≥ 10% <b>Meets:</b> ≥3% but < 10% <b>Approaching:</b> ≥1% but <3% <b>Does Not Meet:</b> 0%
		<b>Measuring Grade Level Performance</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will score 50% or higher on the EBRW SAT	Are students performing at grade-level on college readiness state benchmark standards in reading and writing?	Testing scores reported by MiSchool data	<b>Exceeds:</b> ≥ 60% <b>Meets:</b> ≥50% but < 60% <b>Approaching:</b> ≥30% but <50% <b>Does Not Meet:</b> < 30%
		<b>Measuring Grade Level Performance</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will score 40% or higher on the math SAT	Are students performing at grade-level on college readiness state benchmark standards in math?	Testing scores reported by MiSchool data	<b>Exceeds:</b> ≥ 50% <b>Meets:</b> ≥40% but < 50% <b>Approaching:</b> ≥30% but <40% <b>Does Not Meet:</b> < 30%

**Figure 4**

## Academic Indicators for School Support – Alternative Education and Strict Discipline Academies

Academies designated as Alternative Education Academies or Strict Discipline Academies, as per the Michigan School Code, may be exempted from certain requirements due to their unique nature. The following targets, measures, and rubrics were mutually developed and agreed upon by the academy and the CSO and shall be attached to their contract. Both groups feel that these measures align with the academies' unique missions, and the data derived from these reports will hold students accountable for their academics and behavior.

The school support team will utilize the support indicator targets, measures, and rubrics in **Figures 5-6** to evaluate the academic performance of alternative education and strict discipline academies.

Academic Indicators for School Support- Alternative Education Academies			
<b>Exceeds</b>	Any combination of "Meets" or "Exceeds" in all indicators		
<b>Meets</b>	Any combination of "Meets" or "Exceeds" plus has no more than 1 "Approaching" and/or 1 "Does Not Meet" indicator		
<b>Approaching</b>	Any combination of "Meets," "Exceeds" or "Approaching" indicators plus no more than 2 "Does Not Meet" indicators		
<b>Does Not Meet</b>	Any combination of "Meets," "Exceeds," or "Approaching" plus has 3 or more "Does Not Meet" indicators		
		Measuring State Expectations	
Target	Reason for Tracking	Measure	Rubric
75% of all MICIP goals are met	Is the school meeting the state approved academic expectation and plan they have submitted?	Academies will meet 75% of current goals and "on track to meet" ongoing MICIP goals as submitted to the state of Michigan	<b>Exceeds:</b> All goals are met <b>Meets:</b> ≥75% but < 100% <b>Approaching:</b> ≥ 50% but <75% <b>Does Not Meet:</b> <50%
		Measuring Academics	
Target	Reason for Tracking	Measure	Rubric
70% of students will gain at least 2 credits per semester they are enrolled	Are students making the expected semester growth to earn their high school diploma?	Academies will maintain a spreadsheet of all students enrolled each semester and submit the percentage achieved at the end of the school year	<b>Exceeds:</b> ≥85 <b>Meets:</b> ≥70 but < 85 <b>Approaching:</b> ≥55 but < 70 <b>Does Not Meet:</b> < 55

Figure 5

Continued on the following page

**Academic Indicators for School Support – Alternative Education Academies Cont.**

		<b>Measuring Academics</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
60% student attendance rate for "All Students"	Are students attending school on a regular basis to obtain the knowledge needed to graduate?	Academies will score a minimum of 60% for "All Students" on the MiSchool Data Student Attendance Report	<b>Exceeds:</b> ≥80% <b>Meets:</b> ≥60% but < 80% <b>Approaching:</b> ≥40% but <60% <b>Does Not Meet:</b> < 40%
		<b>Measuring Behavior</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
By June of each year, 70% of academy-identified students eligible for graduation will successfully meet all graduation requirements and receive a diploma.	To determine whether identified students eligible for graduation are completing the courses required to obtain a high school diploma.	Academies will provide a year-end report showing the number of eligible students still enrolled as of the last day of school, along with the number of official graduates.	<b>Exceeds:</b> ≥ 85% <b>Meets:</b> ≥ 70% but < 85% <b>Approaching:</b> ≥ 50% but <70% <b>Does Not Meet:</b> < 50%
		<b>Measuring Social Emotional Needs</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
70% of students will show progress after the second screening in at least one area of a social emotional screening	Are students making the expected growth towards gaining the proper social emotional skills needed to prepare them for success?	Academies will submit a report from two consecutive testing sessions using a mutually agreed upon SEL screening tool at the end of each school year	<b>Exceeds:</b> ≥85% <b>Meets:</b> ≥70% but < 85% <b>Approaching:</b> ≥ 55% but <70% <b>Does Not Meet:</b> <55%

**Figure 5**

<b>Academic Indicators for School Support- Strict Discipline Academies</b>			
<b>Exceeds</b>	Any combination of "Meets" or "Exceeds" in all indicators		
<b>Meets</b>	Any combination of "Meets" or "Exceeds" <b>AND</b> has no more than 1 "Approaching" and/or 1 "Does Not Meet" Indicator		
<b>Approaching</b>	Any combination of "Meets," "Exceeds," or "Approaching" indicators <b>AND</b> no more than 2 "Does Not Meet" indicators		
<b>Does Not Meet</b>	Any combination of "Meets," "Exceeds," or "Approaching" <b>AND</b> has 3 or more "Does Not Meet" indicators		
		<b>Measuring State Expectations</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
75% of all MICIP goals are met	Is the school meeting the state approved academic expectation and plan they have submitted?	Academies will meet 75% of current goals and be "on track to meet" ongoing MICIP goals as submitted to the state of Michigan.	<b>Exceeds:</b> All goals are met <b>Meets:</b> ≥75% but < 100% <b>Approaching:</b> ≥ 50% but <75% <b>Does Not Meet:</b> <50%
		<b>Measuring Attendance</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
The academy will reach an average daily attendance rate of 70% for the academic year.	Are students attending school regularly to obtain the knowledge needed to graduate?	Academies will track and submit an attendance report from their school information system at the end of each school year  The SDA can choose what is considered appropriate attendance for each student based on student's individual need.	<b>Exceeds:</b> ≥85% <b>Meets:</b> ≥70% but < 85% <b>Approaching:</b> ≥ 55% but <70% <b>Does Not Meet:</b> <55%
		<b>Measuring Behavior</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
70% of students will show an increase in their social skills from fall to spring (or enrollment until departure)	Are students making sufficient growth in the social skills needed to prepare them for success?	Academies will track and submit a report from their SEL data at the end of each school year.	<b>Exceeds:</b> ≥85% <b>Meets:</b> ≥70% but < 85% <b>Approaching:</b> ≥ 55% but <70% <b>Does Not Meet:</b> <55%

Figure 6

Continued on the following page

**Academic Indicators for School Support – Strict Discipline Academies Cont.**

		Measuring Behavior	
Target	Reason for Tracking	Measure	Rubric
70% of students will show an improvement in their behavior from fall to spring (or enrollment until departure)	Are students making the expected growth in regulation and self-control to prepare them for success?	Academies will track and submit a report from their behavior data at the end of each school year.  *Students with less than 10 behavior incidents are automatically considered “improved”	<b>Exceeds:</b> ≥85% <b>Meets:</b> ≥70% but < 85% <b>Approaching:</b> ≥ 55% but <70% <b>Does Not Meet:</b> <55%
		Measuring Social Emotional Needs	
Target	Reason for Tracking	Measure	Rubric
70% of students will show progress after the second screening in at least one area of a social emotional screening	Are students making the expected growth towards gaining the proper social emotional skills needed to prepare them for success?	Academies will submit a report from two consecutive testing sessions using a mutually agreed upon SEL screening tool at the end of each school year	<b>Exceeds:</b> ≥85% <b>Meets:</b> ≥70% but < 85% <b>Approaching:</b> ≥ 55% but <70% <b>Does Not Meet:</b> <55%

**Figure 6**

## **Pillar 2 – Fiscal Solvency**

The CSO evaluates the fiscal health of its schools continuously throughout the year. **The fiscal oversight and support determination process provides the CSO with a mechanism to identify schools to help determine the level of oversight, support, intervention, and proper allocation of resources necessary to accomplish its support goals.** The fiscal oversight and support system relies on the evaluation of financial statements.

Based on national best practices, the CSO has identified key support and performance indicators that will allow it to analyze a school's fiscal health effectively. Those key support indicators are listed in **Figure 7**.

Twice a year in a scheduled support meeting, the CSO school support team will use an evaluation of the support indicators to identify the support and interventions necessary to support its schools based upon the specific deficiencies noted in the evaluation.

### **Fiscal Indicators for School Support**

The CSO will utilize the support indicator targets, measures, and rubrics in **Figure 7** to evaluate the fiscal performance of each academy.

Fiscal Indicators for School Support			
<b>New School</b>	The school is in its first year of operation and does not receive an indicator level		
<b>Fiscally Stable</b>	Does not meet one of the PRIMARY KPIs <b>OR</b> Meets all KPIs		
<b>Identified for Review</b>	Does not meet two of the PRIMARY KPIs <b>OR</b> does not meet Enrollment Change KPI <b>AND</b> does not meet the Current Year Enrollment KPI		
<b>Does Not Meet</b>	Does not meet three of the PRIMARY KPIs		
PRIMARY - Current Ratio		Measuring compliance with Staff Certifications	
Target	Reason for Tracking	Measure	Rubric
Current Ratio is $\geq$ to 1.0	Can the school pay its short term obligations?	current assets/current liabilities	<b>Meets:</b> Meets the target <b>Does Not Meet:</b> Does not meet the target
PRIMARY - Change in Fund Balance Ratio		Measuring Compliance with MUSIC Insurance Coverage Requirements	
Target	Reason for Tracking	Measure	Rubric
<p>The fund balance is greater than 20% of revenue and other sources <b>OR</b> the most recent year change in fund balance ratio is positive and aggregated 3 year change in fund balance ratio is positive</p> <p><b>OR</b></p> <p>Aggregated 3-year change in fund balance ratio is greater than -1.5% <b>AND</b> the previous year change in fund balance ratio is positive <b>AND</b> most recent year change in fund balance ratio is positive</p> <p><b>*Note:</b> Schools is the first year of operation will have a positive fund balance (greater than 0) and schools in their second year of operation will have a change in fund balance ratio for the two years that is positive.</p>	Is the school operating within its means?	<p>Fund balance is greater than 20% of revenues and other sources</p> <p><b>OR</b></p> <p>Change in FB ratio: most recent year change in fund balance/most recent year total revenues and other sources</p> <p>Aggregated change in FB ratio: sum of 3 years change in fund balance/ sum of 3 years of total revenues and other sources</p> <p><b>*Note:</b> Change in FB includes other sources and other uses</p>	<b>Meets:</b> Meets the target <b>Does Not Meet:</b> Does not meet the target

Figure 7

Continued on the following page

**Fiscal Indicators for School Support Cont.**

PRIMARY - Days Cash on Hand		Measuring Timeliness of Epicenter Tasks	
Target	Reason for Tracking	Measure	Rubric
At least 60 days of unrestricted cash on hand <b>OR</b> Between 30 and 60 days of unrestricted cash on hand with a positive increase from the previous year	Does the school have the cash available to pay bills?	Unrestricted cash/(total expenditures + other uses /365)	<b>Meets:</b> Meets the target <b>Does Not Meet:</b> Does not meet the target
PRIMARY - Enrollment Change (Over Time)		Measuring Accuracy/Completeness of Epicenter Tasks	
Target	Reason for Tracking	Measure	Rubric
Current year enrollment is greater than or equal to 95% of enrollment 5 years ago <b>AND</b> Current year's enrollment is greater than or equal to 95% of previous year enrollment	Is the school's main revenue source stable over time?	Current year preliminary fall headcount enrolled / year 1 audited fall headcount <b>AND</b> Current year preliminary fall headcount enrolled / previous year (year 4) audited fall headcount	<b>Meets:</b> Meets the target <b>Does Not Meet:</b> Does not meet the target
PRIMARY - Debt to Asset Ratio		Measuring State Notification of Non-compliance of a State Requirement	
Target	Reason for Tracking	Measure	Rubric
Debt to asset ratio is equal to or less than .9	Does the school own more in assets than it owes in liabilities?	Total liabilities (governmental activities)/total assets (governmental activities)	<b>Meets:</b> Meets the target <b>Does Not Meet:</b> Does not meet the target
SECONDARY - Current Year Enrollment Change		Measuring State Notification of Non-compliance of a State Requirement	
Target	Reason for Tracking	Measure	Rubric
Current year's enrollment is greater than or equal to 95% of previous year enrollment	Is the school's current year enrollment stable?	Current year preliminary fall headcount enrolled / previous year audited fall headcount	<b>Meets:</b> Meets the target <b>Does Not Meet:</b> Does not meet the target

Figure 7

# Fiscal Oversight and Support Identifies

Based on an academy’s performance with the fiscal indicators presented in **Figure 7**, schools will be assigned one of the following fiscal support identifiers:

## Fiscal Support Identifiers

<b>Fiscal Concern School (FC)</b>
An academy will be classified as a Fiscal Concern School if it is a: <ol style="list-style-type: none"><li>1. School that does not meet 3 or more of the primary support indicators</li><li>2. School Identified for Review that, based upon review and professional judgement, is moved to Fiscal Concern</li></ol> <p>The CSO will determine the necessary interventions and support.</p>
<b>Identified for Review (IR)</b>
An academy will be Identified for Review if it fails to: <ol style="list-style-type: none"><li>1. Meet 2 of the primary support indicators</li><li>2. Meet the enrollment change support indicators and does not meet the current year enrollment support indicator (secondary)</li></ol> <p>The CSO will determine if the school moves to a Fiscal Concern school or if it will continue to be Identified for Review.</p>
<b>Fiscally Stable School (FS)</b>
An academy will be classified as a fiscally stable school if it: <ul style="list-style-type: none"><li>• Does not meet one of the primary support indicators or meets all support indicators</li></ul> <p>All Fiscally Stable Schools will follow the CSO’s basic oversight and review process.</p>
<b>New Schools (Tier 0)</b>
Schools in the first year of operation are identified as a New School.

Figure 8

## FSU CSO Standard Fiscal Oversight Model

The CSO applies the calculation of the support indicators on the audited financial statements and the 4th Quarter financial statements. In addition, the CSO performs the evaluations explained in **Figure 9** throughout the year to determine the quality of financial reporting and oversight of each school.

FSU CSO Standard Fiscal Oversight Model					
Standard Oversight – Warning System	Warning Indicators	Timing	Business Rule	Formula	Source
Does the school have issues with internal controls? Is the school a going concern?	Financial Controls	Nov.	1) Unmodified opinion 2) No material weaknesses or a going concern	Review of audit letters and notes	AFS
Are the second quarter financial statements complete?	Quality of Submissions	Jan.	1) Correct year and quarter 2) The statements include a balance sheet and the statement of revenues, expenditures and changes in fund balance 3) The statements include a balance sheet that is balanced 4) The statements include a change in fund balance on the balance sheet that is the same as the change in fund balance on the statement of revenues, expenditures and change in fund balance	Compliance review	QFS
Are the third quarter financial statements complete?	Quality of Submissions	April	1) Correct year and quarter 2) The statements include a balance sheet and the statement of revenues, expenditures, and change in fund balance 3) The statements include a balance sheet that is balanced, and the statements include a change in fund balance on the balance sheet that is the same as the change in fund balance on the statement of revenues, expenditures, and change in fund balance	Compliance review	QFS
Is the school ending the year in a deficit?	Deficit	June	Zero or positive fund balance	Fund balance equal to or greater than 0	Final Amened Budget
Is the current year budgeted state aid revenue stable compared to last year's state aid revenue?	Unrestricted State Aid Revenue Stability	July	Budgeted unrestricted state aid revenue is between 95% and 105% of previous year's state aid revenue	Current year FSR (July) foundation grant/Budgeted unrestricted state aid revenue	Original Budget
Is the school operating within its means?	Projected General Fund Balance Ratio	July	Projected General Fund ending fund balance is $\geq$ 5% of total expenditures	Projected General Fund ending fund	Original Budget

Figure 9

Continued on the following page

**FSU CSO Standard Fiscal Oversight Model Cont.**

<b>Standard Oversight – Warning System</b>	<b>Warning Indicators</b>	<b>Timing</b>	<b>Business Rule</b>	<b>Formula</b>	<b>Source</b>
<b>Are the fourth quarter financial statements complete?</b>	Quality of Submissions	Jan.	<ol style="list-style-type: none"> <li>1) Correct year and quarter</li> <li>2) The statements include a balance sheet and the statement of revenues, expenditures, and change in fund balance</li> <li>3) The statements include a balance sheet that is balanced</li> <li>4) The statements include a change in fund balance on the balance sheet that is the same as the change in fund balance on the statement of revenues, expenditures, and change in fund balance</li> </ol>	Compliance review	QFS
<b>Is the school projected to end the year with a deficit?</b>	Deficit	July	Zero or positive fund balance	Fund balance $\geq 0$	4th QFS Accrual
<b>Can the school pay its large contracts?</b>	ESP and/or lease forgiveness	Through-out July	Review 4th QFS	Review of financial statements	4th QFS Accrual
<b>Is budgeted state aid revenue overstated (based on enrollment) compared to actual enrollment?</b>	State Aid Revenue Variance (Enrollment)	Oct.	Actual enrollment is $\geq 95\%$ budgeted enrollment	Actual enrollment is $\geq 95\%$ of budgeted enrollment	Original Budget
<b>Are the first quarter financial statements complete?</b>	Quality of Submissions		<ol style="list-style-type: none"> <li>1) Correct year and quarter</li> <li>2) The statements include a balance sheet and the statement of revenues, expenditures, and change in fund balance</li> <li>3) The statements include a balance sheet that is balanced</li> <li>4) The statements include a change in fund balance on the balance sheet that is the same as the change in fund balance on the statement of revenues, expenditures, and change in fund balance</li> </ol>	Compliance review	QFS
<b>Are there any financial related items included in the board meeting minutes that need to be considered?</b>	Board Minutes	Monthly	Review the board meeting minutes to determine if there are any financial related items that need to be considered	Review of board meeting minutes	Board Meeting Minutes

**Figure 9**

## Pillar 3 – Operations

To evaluate the operations and governance of its schools, the CSO has identified the following operational and governance components to measure.

### Expectations for Effective Board Meetings

CSO Field Representatives attend every board meeting and evaluate the governance of a school based on a board governance rubric. The rubric in **Figure 11** is specifically evaluating the board meeting expectations in **Figure 10**.

ACADEMIC PILLAR	COMPLIANCE AND GOVERNANCE PILLAR
<ul style="list-style-type: none"> <li>• The educational contractual goals were discussed</li> <li>• Data was presented on school growth and achievement</li> <li>• The Board acknowledged and supported the needs of diverse learners (ex. Special Education, ELL, Socioeconomic subgroups, etc.)</li> <li>• The Board asked relevant questions to the school’s academic growth and achievement</li> <li>• Data was discussed and used to make decisions</li> <li>• Academic success was celebrated</li> </ul>	<ul style="list-style-type: none"> <li>• The Board properly followed the Open Meetings Act</li> <li>• The Board properly followed Robert’s Rules of Order</li> <li>• The Board discussed Epicenter on time and accuracy compliance</li> <li>• State Non-Compliance notifications were discussed, if appropriate</li> <li>• Board member(s) presented/shared newly learned information from a professional development training/webinar</li> </ul>
FISCAL PILLAR	OPERATIONS PILLAR
<ul style="list-style-type: none"> <li>• The Board discussed short term financial obligations</li> <li>• The Board received, reviewed, and asked questions regarding financial statements and the school’s budget</li> <li>• The Board discussed any transactions or acquisitions, especially those over \$150,000</li> <li>• The Board discussed the school’s overall fiscal health</li> <li>• Data was discussed and used to make decisions</li> </ul>	<ul style="list-style-type: none"> <li>• All Board members were present for the meeting</li> <li>• All Board members were prepared for the meeting</li> <li>• The Board discussed the school’s operations</li> <li>• The Board discussed school climate and culture</li> <li>• The Board discussed school safety and security</li> <li>• The Board discussed current staffing numbers, needs, and retention</li> <li>• The Board used the school’s vision and mission to drive discussion and decision making</li> <li>• Data was discussed and used to make decisions</li> </ul>

**Figure 10**

## Board Meetings Evaluation Rubric

RATING	EXPECTATIONS
5	<ul style="list-style-type: none"> <li>• The Board appears independent from the school leaders and management company</li> <li>• The Board engages with the school leaders by asking good questions</li> <li>• School leaders provide meaningful and relevant data about the school’s performance</li> <li>• All Board members attended the meeting</li> <li>• Appropriate board protocol is used</li> </ul>
4	<ul style="list-style-type: none"> <li>• One of the expectations was not present</li> </ul>
3	<ul style="list-style-type: none"> <li>• Two of the expectations were not present</li> </ul>
2	<ul style="list-style-type: none"> <li>• Three of the expectations were not present</li> </ul>
1	<ul style="list-style-type: none"> <li>• The Board does not appear to be independent from the school leaders or management company</li> <li>• The Board does not engage meaningfully with quality questions</li> <li>• School leaders do not provide meaningful and relevant data about the school’s performance</li> <li>• Board members were absent for the meeting</li> <li>• Appropriate board protocol is not used</li> </ul>

Figure 11

Field representatives will identify any of the above items that are missing and inform the CSO. When a board is continuously missing one or more of the above expectations, it is identified for support. The CSO does not expect that all specific items identified in **Figure 10 and Figure 11** will be present in every meeting, but that boards will be addressing these topics throughout the year as a demonstration of effective governance.

### Staff Retention Rates

The CSO has contracted with a human resources firm to audit and track employee turnover. With the information provided through the audit, the CSO can calculate a turnover rate for each school.

**Research shows that high rates of staff turnover indicate the potential for issues with the educational environment, and schools with high rates of turnover are identified for support.**

## School Safety and Security

Twice a year, FSU-CSO Field Representatives will perform safety walkthroughs of their assigned academies. A 49-point checklist has been created to help verify that buildings are safe for students and staff. If there are any deficiencies found, schools are identified for support.

### School Safety and Security Checklist

1.  Exterior doors are locked.
2.  A method (e.g., cameras, windows) is used to determine identity of visitors before being admitted.
3.  Signs are posted stating that visitors must be identified before entering.
4.  Visitors have some form of identifier signaling that they checked in with the main office.
5.  Doors are locked to unoccupied instructional spaces.
6.  External security cameras are in place, functional, and monitored.
7.  Centralized communication (e.g., PA systems, phones with speaker capability) is available in all spaces with students and staff.
8.  Evacuation maps are present in all spaces with staff and students.
9.  Emergency exits are clearly marked.
10.  Building space is clean and generally well maintained.
11.  Hallways are clear of items that could be unsafe either to hide behind or cause injury.
12.  All students are under adult supervision during the school day.
13.  Appropriate staff have access to CPI training and implementation of de-escalation strategies are evident.
14.  OSHA/MIOSHA workplace required posters are displayed in a conspicuous place.
15.  Hazardous chemicals and cleaners are properly labeled and safely secured.
16.  Materials Safety Data Sheets are on-site and available for review.
17.  Fire extinguishers are properly maintained and inspected.
18.  Using non-certified staff (e.g., support staff, cafeteria staff, custodians, secretaries, counselor) staff can describe emergency procedures and building routes.
19.  Exterior doors are locked.
20.  A method (e.g., cameras, windows) is used to determine identity of visitors before being admitted.
21.  Signs are posted stating that visitors must be identified before entering.
22.  Visitors have some form of identifier signaling that they checked in with the main office.
23.  Doors are locked to unoccupied instructional spaces.
24.  External security cameras are in place, functional, and monitored.
25.  Centralized communication (e.g., PA systems, phones with speaker capability) is available in all spaces with students and staff.
26.  Evacuation maps are present in all spaces with staff and students.
27.  Emergency exits are clearly marked.
28.  Building space is clean and generally well maintained.
29.  Hallways are clear of items that could be unsafe either to hide behind or cause injury.

30.  All students are under adult supervision during the school day.
31.  Appropriate staff have access to CPI training and implementation of de-escalation strategies are evident.
32.  OSHA/MIOSHA workplace required posters are displayed in a conspicuous place.
33.  Hazardous chemicals and cleaners are properly labeled and safely secured.
34.  Materials Safety Data Sheets are on-site and available for review.
35.  Fire extinguishers are properly maintained and inspected.
36.  Using non-certified staff (e.g., support staff, cafeteria staff, custodians, secretaries, counselor) staff can describe emergency procedures and building routes.
37.  If the school has an elevator, there is evidence that it has been inspected.
  
38.  Playground or other outside space used by students is secure (e.g., fencing, gates, properly staffed) and properly maintained.
39.  Policies and procedures are in place to monitor bags and backpacks and allow for searching.
40.  Appropriate staff are trained in First Aid, AED and CPR.
41. The following medical equipment is on-site and identified staff members have been trained to use/administer if needed:
  42.  Sharps Container
  43.  EpiPens
  44.  Automated External Defibrillators (AEDs)
45.  There is a publicly available Drinking Water Management Plan.
46.  The school has a plan to install filtered bottle filling stations and filtered faucets by the end of the 2025-2026 school year.
47.  There is an Emergency Operation Plan that is reviewed biannually and communicated to all staff.
48.  There is a Cardiac Emergency Response Plan that is reviewed annually and communicated to all staff.
49.  The weekly Crime Log is available for review. (The report may be titled something else. It must include crimes involving physical violence, gang-related activity, illegal possession of a controlled substance or controlled substance analogue, or other intoxicant, trespassing, and property crimes including, but not limited to, theft and vandalism. For a property crime, the report shall include an estimate of the cost to the school district resulting from the property crime.)

## Building Culture Observations

Three times a year, Field Representatives will observe the building culture, instructional practice, and instructional quality of their assigned academies based on the components identified in **Figures 12 -13**. When deficiencies are identified in any of these categories, schools are identified for support by the school support team. Deficiencies are identified and shared with the CSO. If a trend is identified that may indicate a systemic training or communication issue, the school is identified for support by the CSO.

## Instructional Practice Indicators

<p><b>Management &amp; Behavior Systems</b></p>	<ul style="list-style-type: none"> <li>• Management and/or PBIS systems are present and implemented successfully in classrooms.</li> <li>• In-classroom behaviors are redirected with minimal effort.</li> <li>• Instructional staff consistently use positive reinforcement and evidence of behavior systems and/or PBIS is implemented.</li> <li>• Instructional time and learning are maximized through efficient transitions and management routines.</li> <li>• Monitoring behavior is built into SIS/other mechanisms</li> <li>• Classroom shows evidence of school initiatives</li> </ul>
<p><b>Resources</b></p>	<ul style="list-style-type: none"> <li>• Curricular resources are age-appropriate and relate to the course/content.</li> <li>• Supplies for staff and students are readily available and grade-level appropriate.</li> <li>• Adequate technology is available and functions properly.</li> <li>• Space, organization, storage, and furniture are age appropriate.</li> <li>• All resources are being used appropriately.</li> </ul>
<p><b>Instructional System</b></p>	<ul style="list-style-type: none"> <li>• Lessons are grade-level appropriate and appear to follow a logical scope and sequence.</li> <li>• Purpose is clearly communicated to students using verbal, visual, or other strategies/techniques.</li> <li>• Assessment tasks allow students to demonstrate learning in a variety of ways.</li> <li>• Formative assessment is evident and used to adjust instruction.</li> <li>• Rigor is appropriate for the abilities of all students.</li> <li>• Students actively participate and possibly led by instruction.</li> <li>• Evidence of multiple strategies is present in daily instruction: whole group, small group, re-teaching, peer-to-peer instruction.</li> </ul>
<p><b>Instructional Support for Students</b></p>	<ul style="list-style-type: none"> <li>• Routines lead to support for all students.</li> <li>• Evidence of data and use when supporting student needs.</li> <li>• Proper support staff are in place to serve students and are visible in classrooms.</li> <li>• Differentiation is available based on student needs.</li> </ul>
<p><b>Relationships &amp; Engagement</b></p>	<ul style="list-style-type: none"> <li>• Instructional strategies are varied and grade level appropriate and promote student questions/talk.</li> <li>• Positive staff and student interaction is evident.</li> <li>• Positive student-to-student interaction is evident.</li> <li>• Staff redirect students appropriately and efficiently.</li> </ul>

Figure 12

## Climate and Culture Indicators

<p><b>Routines &amp; Systems</b></p>	<ul style="list-style-type: none"> <li>• Supervised and consistent expectations are evident in all common areas of the building. (Ex. hallways, cafeterias, playgrounds, etc.)</li> <li>• All areas in the building have an adult presence and systems in place during transitions, arrival, and dismissal.</li> <li>• PBIS or similar support is visible.</li> <li>• Schedules are apparent and posted.</li> <li>• Communication between all adults is evident.</li> </ul>
<p><b>Resources</b></p>	<ul style="list-style-type: none"> <li>• Access to relevant and adequate resources to support learning and behavior management.</li> <li>• Materials and resources are readily available.</li> <li>• Effective use of staff (paraprofessionals, aides, etc.)</li> <li>• Technology is available to all students.</li> <li>• Community partnerships are present.</li> </ul>
<p><b>Safety</b></p>	<ul style="list-style-type: none"> <li>• Students appear to feel emotionally and physically safe.</li> <li>• Mental Health support is available to meet a variety of student needs.</li> <li>• Classrooms and community areas within the building are physically safe.</li> <li>• Technology safety guidelines are apparent.</li> <li>• Behavior is appropriate and conducive to a safe and positive learning environment.</li> </ul>
<p><b>Physical Environment</b></p>	<ul style="list-style-type: none"> <li>• The building is clean, and shared spaces are well organized.</li> <li>• There is adequate space for movement.</li> <li>• Evidence of student work is displayed in the common areas.</li> <li>• Celebrations of student cultures are evident. (Ex. photos, student work, school events, etc.)</li> <li>• All stakeholders adhere to rules, procedures, and expectations.</li> </ul>
<p><b>Relationships</b></p>	<ul style="list-style-type: none"> <li>• Positive adult-to-student interactions are evident.</li> <li>• Positive and professional adult interactions are evident.</li> <li>• Positive student-to-student interactions are evident.</li> <li>• Adults value, acknowledge, and celebrate all students' backgrounds and ideas.</li> <li>• Students appear to feel ownership of their school, valued, and comfortable.</li> </ul>

Figure 13

## Evaluating Overall Operational Effectiveness

Twice a year in a scheduled support meeting, the CSO school support team will use an evaluation of the support indicators identified in **Figure 14** to identify the support and interventions necessary to support its schools.

## Operations Indicators for School Support

The CSO will utilize the support indicator targets, measures, and rubrics in **Figure 14** to evaluate the operational performance of each academy.

Operations Indicators for School Support			
<b>Exceeds</b>	"Exceeds" in 3 or more Indicators, no less than "Meets" in 2 indicators		
<b>Meets</b>	"Meets" in 3 or more Indicators, no less than "Approaching" in 2 indicators		
<b>Approaching</b>	No less than "Approaching" in all indicators		
<b>Does Not Meet</b>	"Does Not Meet" in any one indicator		
Board Meeting Effectiveness		Measuring Quality of Management Effectiveness	
Target	Reason for Tracking	Measure	Rubric
During the academic school year, the academy will obtain a 95% average on all of the Board Meeting Quality Reviews	Is the School Board adequately trained and operating effectively?	Academies will obtain an average of 95% or higher on the Ferris State University CSO Board Meeting Checklist Quality Rubric	<b>Exceeds:</b> 100% < > 95% <b>Meets:</b> 95% < > 85% <b>Approaching:</b> 85% < > 75% <b>Does Not Meet:</b> < 75%
Staffing Retention Rates		Measuring Health of Staff Morale	
Target	Reason for Tracking	Measure	Rubric
During the academic school year, the academy will retain 90% or more of their teaching, support, and administrative staff	Is there stability in the school's staffing?	Academies will maintain a retention rate of 90% or more from the QPRG staff reports	<b>Exceeds:</b> 100% < > 95% <b>Meets:</b> 95% < > 85% <b>Approaching:</b> 85% < > 75% <b>Does Not Meet:</b> < 75%
Safety/Security		Measuring Health of Educational Environment	
Target	Reason for Tracking	Measure	Rubric
During the academic school year, the academy will obtain a 95%-100% average from two safety checklists	Is the school operating with effective safety practices?	Academies will obtain an average of 95% or higher on the Ferris State University CSO School Safety and Security Checklist	<b>Exceeds:</b> 100% <b>Meets:</b> 99% < > 95% <b>Approaching:</b> 95% < > 90% <b>Does Not Meet:</b> < 90%

Figure 14

Continued on the following page

**Operations Indicators for School Support Cont.**

<b>Building Culture</b>		<b>Measuring Health of Building Culture</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
During the academic school year, the academy will obtain a 75%-100% average from three school visitations	Is the building exhibiting the culture necessary for quality education?	Schools will obtain an average of 75% or higher on the Ferris State University CSO Classroom/School Visitation Form Section 2 conducted three times a year	<b>Exceeds:</b> 100% <b>Meets:</b> 99% < > 75% <b>Approaching:</b> 75% < > 50% <b>Does Not Meet:</b> < 50%
<b>Instructional Practice/Quality</b>		<b>Measuring Quality of Instructional Practice</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
During the academic school year, the academy will obtain a 75%-100% average from three school visitations	Are educator practices creating the conditions for quality education?	Schools will obtain an average of 75% or higher on the Ferris State University CSO Classroom/School Visitation Form Section 1 conducted three times a year	<b>Exceeds:</b> 100% <b>Meets:</b> 99% < > 75% <b>Approaching:</b> 75% < > 50% <b>Does Not Meet:</b> < 50%

**Figure 14**

## **Pillar 4 – Compliance**

### **Staff Certification**

The CSO has contracted with a firm experienced in auditing the certification and legal documentation required for school employees. Three times each year, the firm provides a detailed report and review of staff certification and documentation, including the identification of any deficiencies. Depending upon the severity and frequency of any deficiencies, the CSO will evaluate the school for support.

### **Insurance Coverage**

The CSO has contracted with a firm to evaluate each school's compliance with required insurance coverage based on the authorization contract standards. Discrepancies are identified and reported to school leaders for correction. Depending upon the severity of the discrepancies and the frequency of reminders for correction, the CSO will evaluate the school for support.

### **Epicenter On-Time Submission Compliance**

The CSO uses a document management system called Epicenter to track and store all the documents that schools must submit to MDE and the authorizer following the contractual requirements of the CSO. The system tracks and reports missed deadlines for these required reports. When schools consistently miss deadlines and reach a lower rating for missed submissions, they are identified by the CSO for support and training.

### **Epicenter Submission Accuracy**

The CSO uses a document management system called Epicenter to track and store all the documents that schools must submit to MDE and the authorizer following the contractual requirements of the CSO. The system allows the CSO to reject inaccurate submissions. When schools consistently submit inaccurate documentation and receive lower ratings for submission accuracy, they are identified by the CSO for support and training.

### **State Non-Compliance Notifications to Authorizers**

CSO staff occasionally receive or become aware of notifications from the state and other agencies of authority related to non-compliance of legal requirements. When that happens, the notification is logged, and communication is made with the school leaders for investigation. Based upon the severity and frequency of these notifications, schools are identified for support by the CSO.

## Evaluating Overall Compliance Effectiveness

The targets, measures, and rubrics identified in **Figure 15** are used to evaluate a school’s compliance effectiveness. Twice a year in CSO school support meetings, the CSO school support team will use an evaluation of the support indicators to identify the support and interventions necessary to support its schools.

## Compliance Indicators for School Support

The CSO will utilize the support indicator targets, measures, and rubrics in **Figure 15** to evaluate the compliance performance of each academy.

<b>Compliance Indicators for School Support</b>			
<b>Exceeds</b>	“Exceeds” in 2 or more Indicators, no less than “Meets” in 2 indicators		
<b>Meets</b>	“Meets” in 2 or more indicators, no less than “Approaching” in 2 indicators		
<b>Approaching</b>	No less than “Approaching” in all indicators		
<b>Does Not Meet</b>	“Does Not Meet” in any one indicator		
<b>Staff Certification</b>		<b>Measuring compliance with Staff Certifications</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will maintain level 1 compliance with staff certification requirements	Are school staff properly certified?	Academies will be audited by QPRG and will reach level 1 compliance by the final review	<b>Exceeds:</b> Level 1 <b>Meets:</b> Level 2 <b>Approaching:</b> Level 3 <b>Does Not Meet:</b> Level 4
<b>Insurance Coverage</b>		<b>Measuring Compliance with MUSIC Insurance Coverage Requirements</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
Academies will maintain 100% compliance with MUSIC insurance coverage requirements	Are the school's insurance policies aligned with authorizer requirements?	Academies will be audited by the Hylant Group for adequate insurance coverage and will not be required to modify their policies to accommodate them	<b>Exceeds:</b> No modifications required after initial review <b>Meets:</b> One request for modification and one reminder for updated proof of insurance after initial review <b>Approaching:</b> Two modification requests and no more than two reminders for updated proof of insurance after initial review <b>Does Not Meet:</b> More than two modifications or more than two requests for updated proof of insurance after initial review

Figure 15

Continued on the following page

**Compliance Indicators for School Support Cont.**

<b>Epicenter On-time Compliance</b>		<b>Measuring Timeliness of Epicenter Tasks</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
The academy and Board of Directors will maintain 100% for on-time Epicenter submissions	Are school compliance requirements completed on time?	The academy and Board of Directors will maintain 98% for on-time Epicenter submissions	<p><b>Exceeds:</b> 100% compliance</p> <p><b>Meets:</b> ≥98% but &lt; 99% compliance</p> <p><b>Approaching:</b> ≥95% but &lt; 98% compliance</p> <p><b>Does Not Meet:</b> &lt; 95% compliance</p>
<b>Epicenter Submission Accuracy</b>		<b>Measuring Accuracy/Completeness of Epicenter Tasks</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
The academy and Board of Directors will maintain 100% for accurate Epicenter submissions	Are school compliance requirements completed accurately?	The academy and Board of Directors will maintain 90% for accurate Epicenter submissions	<p><b>Exceeds:</b> 100% compliance</p> <p><b>Meets:</b> ≥90% but &lt; 99% compliance</p> <p><b>Approaching:</b> ≥80% but &lt; 90% compliance</p> <p><b>Does Not Meet :</b> &lt; 80% compliance</p>
<b>State Non-compliance Notification to Authorizer</b>		<b>Measuring State Notification of Non-compliance of a State Requirement</b>	
<b>Target</b>	<b>Reason for Tracking</b>	<b>Measure</b>	<b>Rubric</b>
The authorizer does not receive any notifications from the state for non-compliance	Is the school in compliance with all state and federal requirements?	The CSO will count the number of times contacted by MDE for non-compliance issues and tally them each year	<p><b>Exceeds:</b> No notifications of non-compliance from MDE or other agencies</p> <p><b>Meets:</b> No more than 2 immaterial notifications of non-compliance from MDE or other agencies</p> <p><b>Approaching:</b> No more than 3 immaterial notifications of non-compliance from MDE or other agencies</p> <p><b>Does Not Meet:</b> More than 4 immaterial notifications or any material notifications from MDE or other agencies</p>

**Figure 15**

## Summary Report

The CSO will generate a report for each of its academies, which will summarize the results of the findings associated with its support determination on a recurring basis—depending upon the timing of the data collection, but annually in November—a final report will be used to determine the schools support level in each pillar (Academic, Fiscal, Operational, and Compliance).

This report will be shared with all school stakeholders along with a letter identifying the support required in each category, if any. An example of this report is below.

### Summary Report – Academic Section

The academic section of the report identifies each area of the evaluation, the rating for each area, an explanation of the reason for tracking, and an interpretation of the results. In addition, depending upon the support level determined for each area, a list of support recommendations is provided on the right.

The ABC Academy				
Academic Support Indicators	Meets	Description		
	2022-23	What questions are we answering?	What are the results telling us?	What FSU support is available?
MDE Support Category	Universal	Has any school in the district been identified as needing supports or interventions by the state due to low academic performance?	Performance was above the state criteria used to identify needed support	<b>Universal Support:</b> Available as needed
Goal 1: 2nd-8th Grade Academic Growth	Meets			
50 on the School Growth Index	Exceeds	Is the school meeting state designation expectations as set forth by the state and federal accountability systems in growth?	Student growth is at the state expected level	<b>Meets:</b> <b>1)</b> CSO sponsored professional development and networking opportunities <b>2)</b> Field Representative’s assistance School Support Team mid-year check in <b>3)</b> Additional supports available upon need/request
50th percentile on NWEA SCGP (Reading)	Meets	Are students making expected annual growth in reading compared to their peers?	Students are growing at expected rates compared to their peers around the nation in reading	
3% Growth on M-STEP/PSAT over time (ELA)	Does Not Meet	Are students making sufficient yearly academic growth to increase proficiency in ELA?	Students are not showing adequate growth to reach proficiency in ELA	

Figure 16

Continued on the following page

Summary Report – Academic Section Cont.

The ABC Academy				
Academic Support Indicators	Meets	Description		
	2022-23	What questions are we answering?	What are the results telling us?	What FSU support is available?
50th percentile on NWEA SCGP (Math)	Approaching	Are students making expected annual growth in math compared to their peers?	Some students are growing at the expected rates compared to their peers around the nation in math	<b>Meets:</b> <b>1)</b> CSO sponsored professional development and networking opportunities <b>2)</b> Field Representative’s assistance School Support Team mid-year check in <b>3)</b> Additional supports available upon need/request
3% growth on M-STEP/PSAT over time (Math)	Does Not Meet	Are students making sufficient yearly academic growth to increase proficiency in math?	Students are not showing adequate growth to reach proficiency in math	
Goal 2: 2nd-8th Grade Academic Proficiency	Meets			
45 on the School Index	Exceeds	Is the school meeting state designation expectations as set forth by the state and federal accountability systems?	School programming and performance is at the state expected level	
50% of students are at grade level norm on the NWEA (reading)	Approaching	Are students achieving proficiency on a nationally normed assessment in reading?	Some students are demonstrating proficiency in reading	
3% difference compared to composite (ELA M-Step/PSAT)	Does Not Meet	Are students outperforming students in schools they might otherwise attend (composite) on the ELA grade level state assessment?	Students are demonstrating lower achievement than their peers in the same geographical area in ELA on the state assessment	
50% of students are at grade level norm on the NWEA (Math).	Approaching	Are students achieving proficiency on a nationally normed assessment in math?	Some students are demonstrating proficiency in math	
3% difference compared to composite (Math M-Step/PSAT)	Does Not Meet	Are students outperforming students in schools they might otherwise attend (composite) on the math grade level state assessment?	Students are demonstrating lower achievement than their peers in the same geographical area in math on the state assessment	

Figure 16

Continued on the following page

Summary Report – Academic Section Cont.

The ABC Academy				
Academic Support Indicators	Meets	Description		
	2022-23	What questions are we answering?	What are the results telling us?	What FSU support is available?
HS Academic Growth & Student Achievement (Overall)	Meets			
3% Growth on SAT Over Time (EBRW)	Meets	Are students making sufficient yearly academic growth to increase proficiency in ELA?	Student growth is at the state expected level to reach proficiency in EBRW	<b>Meets:</b> <b>1)</b> CSO sponsored professional development and networking opportunities <b>2)</b> Field Representative’s assistance School Support Team mid-year check in <b>3)</b> Additional supports available upon need/request
3% difference compared to composite (EBRW SAT)	Exceeds	Are students outperforming students in schools they might otherwise attend (composite) on the state assessment in reading and writing?	Students are demonstrating higher achievement than their peers in the same geographical area in EBRW on the state assessment	
50% meeting standard on EBRW SAT	Approaching	Are students performing at grade-level on college readiness state benchmark standards in reading and writing?	Some students are demonstrating college readiness in reading and writing	
3% Growth on SAT over time (Math)	Does Not Meet	Are students making sufficient yearly academic growth to increase proficiency in math?	Students are not showing adequate growth to reach proficiency in math	
3% difference compared to composite (Math SAT)	Exceeds	Are students outperforming students in schools they might otherwise attend (composite) on the state assessment in math?	Students are demonstrating higher achievement than their peers in the same geographical area in math on the state assessment	
40% meeting standard on Math SAT	Approaching	Are students performing at grade-level on college readiness state benchmark standards in math?	Some students are demonstrating college readiness in math	

Figure 16

## Summary Report – Fiscal Section

The fiscal section is designed to provide the same general information as the academic section, including the rating, reasoning, and interpretation of the findings. Available support based on the findings is listed on the right.

The ABC Academy				
Fiscal Support Indicators	Fiscal Concern	Description		
	2022-23	What questions are we answering?	What are the results telling us?	What FSU support is available?
Current ratio	Meets	Can the school pay their short term obligations?	The school should be able to pay short term obligations	<b>Fiscal Concern:</b> <b>1)</b> CSO sponsored professional development for Board members <b>2)</b> Stress testing for any significant trends or events <b>3)</b> Specialized audit, if needed <b>4)</b> Professional development for PSA staff <b>5)</b> Provide a financial coach if needed
Change in fund balance ratio	Does Not Meet	Is the school operating within its financial means?	The school may be approaching a fund balance that can make medium term funding shortfalls difficult to manage	
Days cash on hand	Does Not Meet	Does the school have the cash available to pay bills?	The school may not be able to pay short term obligations if not temporary	
Enrollment change over time	Meets	Is the school's main revenue source stable over time?	The school's long-term student enrollment and projections are stable	
Debt to asset ratio	Does Not Meet	Does the school own more in assets than it owes in liabilities?	The school may be significantly over-burdened by debt, which could result in financial distress	
Current year enrollment change	Meets	Is the school's current year enrollment stable?	The school's short-term student enrollment and projections are stable	

Figure 17

## Summary Report – Operations and Compliance Section

The Operations and Compliance sections of the report are combined but designed to provide the same level of detail and explanation as the academic and fiscal sections. Since each category requires a different type of support, individualized support based on categories is provided.

### Operations Support Indicators

The ABC Academy				
Operations Support Indicators	Meets	Description		
	2022-23	What questions are we answering?	What are the results telling us?	What FSU support is available?
Board meeting effectiveness	Exceeds	Is the school board adequately trained and operating effectively?	The school board is operating effectively.	<b>Exceeds:</b> Support provided only as requested
Staff retention rates	Meets	Is there stability in the school's staffing?	The hiring and retention practices of the school are effective.	<b>Meets:</b> Support provided only as requested
Safety and Security	Approaching	Is the school operating with effective safety practices?	The school may have some minor improvements needed in safety.	<b>Specialized Support:</b> Includes support from the CSO Field Representative or support from a safety consultant
Building Culture	Meets	Is the building exhibiting the culture necessary for quality education?	The school's culture appears to be healthy and effective.	<b>Meets:</b> Support provided only as requested
Instructional Practice and Quality	Approaching	Are educator practices creating the conditions for quality education?	There may be some improvements that could be made to improve the classroom learning environment.	<b>Specialized Support:</b> Specialized training, support, and evaluation from the CSO in consultation with the school leaders, depending on the situation

Figure 18

## Compliance Support Indicators

The ABC Academy				
Compliance Support Indicators	Meets	Description		
	2022-23	What questions are we answering?	What are the results telling us?	What FSU support is available?
Staff certification	Meets	Are school staff properly certified?	The school is meeting the state's certification requirements	<b>Meets:</b> Support provided only as requested
Insurance coverage	Exceeds	Are the school's insurance policies aligned with authorizer requirements?	The school meets all FSU insurance requirements	<b>Exceeds:</b> Support provided only as requested
Epicenter on-time compliance	Exceeds	Are school compliance requirements completed on time?	The school continuously meets compliance documentation deadlines	<b>Exceeds:</b> Support provided only as requested
Epicenter submission accuracy	Approaching	Are compliance submissions accurate?	The school occasionally submits inaccurate compliance documents	<b>Specialized Support:</b> Direct support and training from the CSO Compliance Specialist
State non-compliance notifications	Meets	Is the school in compliance with all state and federal requirements?	No significant material notifications for non-compliance from MDE or the ISD have been received by the CSO	<b>Meets:</b> Supports provided only as requested

Figure 19



# FERRIS STATE UNIVERSITY

CHARTER SCHOOLS OFFICE

## SCHOOL SAFETY & SECURITY CHECKLIST

**FSU CSO REPRESENTATIVE**

Click or tap to choose a name.

**NAME OF ACADEMY**

Click or tap to choose an Academy.

**DATE**

Click or tap to enter a date.

---

- Exterior doors are locked.
  - A method (e.g., cameras, windows) is used to determine identity of visitors before being admitted.
  - Signs are posted stating that visitors must be identified before entering.
  - Visitors have some form of identifier signaling that they checked in with the main office.
  - Doors are locked to unoccupied instructional spaces.
  - External security cameras are in place, functional, and monitored.
  - Centralized communication (e.g., PA systems, phones with speaker capability) is available in all spaces with students and staff.
  - Evacuation maps are present in all spaces with staff and students.
  - Emergency exits are clearly marked.
  - Building space is clean and generally well maintained.
  - Hallways are clear of items that could be unsafe either to hide behind or cause injury.
  - All students are under adult supervision during the school day.
  - Appropriate staff have access to CPI training and implementation of de-escalation strategies are evident.
  - OSHA/MIOSHA workplace required posters are displayed in a conspicuous place.
  - Hazardous chemicals and cleaners are properly labeled and safely secured.
  - Materials Safety Data Sheets are on-site and available for review.
  - Fire extinguishers are properly maintained and inspected.
  - Using non-certified staff (e.g., support staff, cafeteria staff, custodians, secretaries, counselor) staff can describe emergency procedures and building routes.
    - Staff position #1: Click or tap here to enter text.
    - Staff position #2: Click or tap here to enter text.
  - If the school has an elevator, there is evidence that it has been inspected.
  - Playground or other outside space used by students is secure (e.g., fencing, gates, properly staffed) and properly maintained.
  - Policies and procedures are in place to monitor bags and backpacks and allow for searching.
  - Appropriate staff are trained in First Aid, AED and CPR.
- The following medical equipment is on-site and identified staff members have been trained to use/administer if needed:
- Sharps Container
  - EpiPens
  - Automated External Defibrillators (AEDs)
- There is a publicly available Drinking Water Management Plan.
  - The school has a plan to install filtered bottle filling stations and filtered faucets by the end of the 2025-2026 school year.

- There is an Emergency Operation Plan that is reviewed biannually and communicated to all staff.
- There is a Cardiac Emergency Response Plan that is reviewed annually and communicated to all staff.
- The weekly Crime Log is available for review. (The report may be titled something else. It must include crimes involving physical violence, gang-related activity, illegal possession of a controlled substance or controlled substance analogue, or other intoxicant, trespassing, and property crimes including, but not limited to, theft and vandalism. For a property crime, the report shall include an estimate of the cost to the school district resulting from the property crime.)

\_\_\_\_/32 Total Points

A meeting with the school leaders to discuss the **School Safety & Security Checklist** was held on [Click or tap to enter a date.](#)

The **School Safety & Security Checklist** was shared with the academy board on [Click or tap to enter a date.](#)

**Additional Comments:** [Click or tap here to enter text.](#)

# FERRIS STATE UNIVERSITY

CHARTER SCHOOLS OFFICE

## Classroom Visitations

Each classroom visitation should consider the following four components, recognizing that not all aspects of each component may be witnessed during a visit. **Ratings should be based on observed evidence ONLY.** All four classroom visits must be complete to submit this form to epicenter (exceptions for SD and Alt. Ed. academies).

Academy Name: Choose an Academy      Building (if applicable):

Date of Visitation: Click or tap to enter a date. CSO Member submitting: Choose Name.

### **OVERALL CLASSROOM VISITATION SUPPORT RATING: Choose Rating**

“Exceeds” if contains 2 or more “Exceeds” and no “Approaching” or “Does Not Meet”

“Meets” if contains 2 or more “Meets” and no more than 1 “Approaching” and no “Does Not Meet”

“Approaching” if contains 2 or more “Approaching or higher” and no more than 1 “Does Not Meet”

“Does Not Meet” if contains 2 or more “Does Not Meet”

<b>Classroom Environment/ Culture of Learning</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Teacher and students demonstrate positive relationships that foster student well-being and develop identity as learners.</li><li><input type="checkbox"/> Classroom norms are evident and result in patterns that encourage risk taking, collaboration, and respect.</li><li><input type="checkbox"/> Resources, materials, and technology are age appropriate and relate to the course/content.</li><li><input type="checkbox"/> Instructional time is maximized through efficient transitions, management routines, and positive student discipline.</li><li><input type="checkbox"/> Teacher successfully responds to any misbehavior by referring to the classroom expectations.</li></ul>	<b>Student Engagement &amp; Questioning</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Students can and do take ownership of their learning.</li><li><input type="checkbox"/> There is a mixture of teacher to student and student to student interaction.</li><li><input type="checkbox"/> Students are on task with participating in discussions, independent work, or group projects during the visit.</li><li><input type="checkbox"/> The teacher capitalizes on student strengths (academic background, life experiences, cultural/language).</li><li><input type="checkbox"/> If questioning is present, the teacher uses questioning techniques that probe students for deeper understanding, uncover misconceptions, or clarify students thinking.</li></ul>
<b>Purpose, Curriculum &amp; Pedagogy</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Lessons are grade level appropriate</li><li><input type="checkbox"/> The purpose is clearly communicated through student behavior, verbal, and/or visual strategies.</li><li><input type="checkbox"/> Students can explain what they are learning and why.</li><li><input type="checkbox"/> Instructional materials, scaffolds, and tasks align with the learning target.</li><li><input type="checkbox"/> Success criteria are present and align to the learning targets.</li></ul>	<b>Assessment for Student Learning</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Some form of assessment is present or available.</li><li><input type="checkbox"/> Assessment tasks allow students to demonstrate learning.</li><li><input type="checkbox"/> Students can assess their learning in relation to the success criteria.</li><li><input type="checkbox"/> Targeted feedback is given to students based on learning targets.</li><li><input type="checkbox"/> Students are held accountable for their learning and completed work.</li></ul>

<b>CLASSROOM 1 Overall Rating</b>				
	<b>Does Not Meet - 1</b>	<b>Approaching-2</b>	<b>Meets - 3</b>	<b>Exceeds - 4</b>
Environment: 0	Based on evidence observed, this element is not established with the indicators listed.	Based on evidence observed, this element is present with several indicators, however the application of indicators is still in development.	Based on evidence observed, this element is well established with the indicators listed in a consistent and systematic way.	Based on evidence observed, this element goes beyond the indicators listed and should be looked at as a model for others.
Engagement: 0				
Purpose: 0				
Assessment: 0				
<b>TOTAL: 0 /16</b>	<b>(7 or less)</b>	<b>(8-11)</b>	<b>(12-15)</b>	<b>(16)</b>

Notable factors that influenced the support rating:

<b>CLASSROOM 2 Overall Rating</b>				
	<b>Does Not Meet - 1</b>	<b>Approaching-2</b>	<b>Meets - 3</b>	<b>Exceeds - 4</b>
Environment: 0	Based on evidence observed, this element is not established with the indicators listed.	Based on evidence observed, this element is present with several indicators, however the application of indicators is still in development.	Based on evidence observed, this element is well established with the indicators listed in a consistent and systematic way.	Based on evidence observed, this element goes beyond the indicators listed and should be looked at as a model for others.
Engagement: 0				
Purpose: 0				
Assessment: 0				
<b>TOTAL: 0 /16</b>	<b>(7 or less)</b>	<b>(8-11)</b>	<b>(12-15)</b>	<b>(16)</b>

Notable factors that influenced the support rating:

<b>CLASSROOM 3 Overall Rating</b>				
	<b>Does Not Meet - 1</b>	<b>Approaching-2</b>	<b>Meets - 3</b>	<b>Exceeds - 4</b>
Environment: 0	Based on evidence observed, this element is not established with the indicators listed.	Based on evidence observed, this element is present with several indicators, however the application of indicators is still in development.	Based on evidence observed, this element is well established with the indicators listed in a consistent and systematic way.	Based on evidence observed, this element goes beyond the indicators listed and should be looked at as a model for others.
Engagement: 0				
Purpose: 0				
Assessment: 0				
<b>TOTAL: 0 /16</b>	<b>(7 or less)</b>	<b>(8-11)</b>	<b>(12-15)</b>	<b>(16)</b>

Notable factors that influenced the support rating:

<b>CLASSROOM 4 Overall Rating</b>				
	<b>Does Not Meet - 1</b>	<b>Approaching-2</b>	<b>Meets - 3</b>	<b>Exceeds - 4</b>
Environment: 0	Based on evidence observed, this element is not established with the indicators listed.	Based on evidence observed, this element is present with several indicators, however the application of indicators is still in development.	Based on evidence observed, this element is well established with the indicators listed in a consistent and systematic way.	Based on evidence observed, this element goes beyond the indicators listed and should be looked at as a model for others.
Engagement: 0				
Purpose: 0				
Assessment: 0				
<b>TOTAL: 0 /16</b>	<b>(7 or less)</b>	<b>(8-11)</b>	<b>(12-15)</b>	<b>(16)</b>

Notable factors that influenced the support rating:

# FERRIS STATE UNIVERSITY

CHARTER SCHOOLS OFFICE

## School Climate & Culture Report

This form is to be completed EACH time a Field Representative visits a school for the purpose of classroom visitations. The following four components should be considered during the school observation, recognizing that not all aspects of each component may be witnessed during a visit. **Ratings should be based on observed evidence ONLY.**

Academy Name: Choose an Academy

Building (if applicable):

Date of Visitation: Click or tap to enter a date. CSO Member submitting: Choose Name.

<b>Physical Environment</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> The building is clean and shared spaces are well organized.</li> <li><input type="checkbox"/> Adequate space for movement</li> <li><input type="checkbox"/> Evidence of Student work is displayed in &amp; outside of the classroom environment.</li> <li><input type="checkbox"/> Celebrations of student cultures are evident through photos, school events, student work etc.</li> <li><input type="checkbox"/> All stakeholders demonstrate adherence to rules, procedures, and expectations.</li> </ul>	<b>Safety (Emotional and Physical)</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Students appear to feel emotionally and physically safe</li> <li><input type="checkbox"/> Mental Health support is available to meet a variety of student needs. (visual, print, discussion etc.)</li> <li><input type="checkbox"/> Classrooms and community areas within the building are physically safe.</li> <li><input type="checkbox"/> Technology safety guidelines are apparent (visual, print, discussion etc.)</li> <li><input type="checkbox"/> Behavior is appropriate and conducive to a safe and positive learning environment</li> </ul>
<b>Interpersonal Relationships</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Positive adult to student interactions</li> <li><input type="checkbox"/> Positive and professional adult interactions</li> <li><input type="checkbox"/> Positive student to student interactions</li> <li><input type="checkbox"/> Adults value, acknowledge, and celebrate all students' backgrounds and ideas. (respect diversity)</li> <li><input type="checkbox"/> Students feel valued and comfortable.</li> </ul>	<b>Resources</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Access to relevant and adequate resources to support learning and behavior management.</li> <li><input type="checkbox"/> Materials and resources readily available</li> <li><input type="checkbox"/> Effective use of staff (paraprofessionals, aides, etc.)</li> <li><input type="checkbox"/> Expectations, directions, schedules posted</li> <li><input type="checkbox"/> Technology available to all students</li> </ul>

School Climate & Culture <u>Overall Rating</u>				
	Does Not Meet - 1	Approaching-2	Meets - 3	Exceeds - 4
Physical Environment: 0	Based on evidence observed, this element is not established with the indicators listed.	Based on evidence observed, this element is present with several indicators, however the application of indicators is still in development.	Based on evidence observed, this element is well established with the indicators listed in a consistent and systematic way.	Based on evidence observed, this element goes beyond the indicators listed and should be looked at as a model for others.
Safety: 0				
Interpersonal Relationships: 0				
Resources: 0				
<b>TOTAL: 0 /16</b>	<b>(7 or less)</b>	<b>(8-11)</b>	<b>(12-15)</b>	<b>(16)</b>

Notable factors that influenced the support rating:

---

# FERRIS STATE UNIVERSITY

---

CHARTER SCHOOLS OFFICE

## School Support Documentation

**Academy:** Academy

**Date of Support:** [Click here to enter a date.](#)

**Meeting Time and Length:**

**FSU CSO Staff Present:**

**Academy Staff Present:**

**Meeting Initiated By:** Choose an item.

**Meeting Held:** Choose an item. **Location:**

**Support Notes:**

**Additional Feedback/Suggestions:**

**Additional Comments:**

1020 Maple Street  
Big Rapids, MI 49307  
Phone: (231) 591-5802  
Web: ferris.edu



## **Board Meeting Report**

**Academy Name:** Choose an item.

**Date of Board Meeting:** Click or tap to enter a date.

**CSO Member Submitting Report:** Choose an item.

**Board Action Items:** Click or tap here to enter text.

**Comments:** Click or tap here to enter text.

The following four components should be considered, recognizing that not all aspects of each component may be witnessed during the meeting.

<p style="text-align: center;"><b>Academic Pillar</b></p> <input type="checkbox"/> The educational contractual goals were discussed. <input type="checkbox"/> Data was presented on school growth & achievement. <input type="checkbox"/> The Board acknowledged and supports the needs of diverse learners (ex. Special Education, ELL, Socioeconomic subgroups, etc.). <input type="checkbox"/> The Board asked relevant questions to the school's academic growth & achievement. <input type="checkbox"/> Data was discussed and used to make decisions. <input type="checkbox"/> Academic success was celebrated.	<p style="text-align: center;"><b>Compliance &amp; Governance Pillar</b></p> <input type="checkbox"/> The Board properly followed the Open Meetings Act. <input type="checkbox"/> The Board properly followed Robert's Rules of Order. <input type="checkbox"/> The Board discussed Epicenter on time and accuracy compliance. <input type="checkbox"/> State Non-Compliance notifications were discussed, if appropriate. <input type="checkbox"/> Board member(s) presented/shared newly learned information from a professional development training/webinar.
<p style="text-align: center;"><b>Fiscal Pillar</b></p> <input type="checkbox"/> The Board discussed short term financial obligations. <input type="checkbox"/> The Board received, reviewed, and asked questions regarding financial statements and the school's budget. <input type="checkbox"/> The Board discussed any transactions or acquisitions, especially those over \$150,000. <input type="checkbox"/> The Board discussed the school's overall fiscal health. <input type="checkbox"/> Data was discussed and used to make decisions.	<p style="text-align: center;"><b>Operations Pillar</b></p> <input type="checkbox"/> All Board members were present for the meeting. <input type="checkbox"/> All Board members were prepared for the meeting. <input type="checkbox"/> The Board discussed the school's operations. <input type="checkbox"/> The Board discussed school climate and culture. <input type="checkbox"/> The Board discussed school safety and security. <input type="checkbox"/> The Board discussed current staffing numbers, needs and retention. <input type="checkbox"/> The Board used the school's vision and mission to drive discussion and decision making. <input type="checkbox"/> Data was discussed and used to make decisions.

**Board Meeting Quality Rating**

Rating	5	4	3	2	1
<b>Expectations</b>	<ul style="list-style-type: none"> <li>• The Board appears independent from the school leaders and management company.</li> <li>• The Board engages with the school leaders by asking good questions.</li> <li>• School leaders provide meaningful and relevant data about the school's performance.</li> <li>• All board members attended the meeting.</li> <li>• Appropriate board protocol is used.</li> </ul>	One of the expectations was not present.	Two of the expectations were not present.	Three of the expectations were not present.	<ul style="list-style-type: none"> <li>• The Board does not appear to be independent from the school leaders or management company.</li> <li>• The Board does not engage meaningfully with quality questions.</li> <li>• School leaders do not provide meaningful and relevant data about the school's performance.</li> <li>• Board members were absent for the meeting.</li> <li>• Appropriate board protocol is not used.</li> </ul>

Ratings should be based on observed evidence only and should reflect your impressions of board governance over time.

**Board Meeting Quality Rating:** Choose an item. **Notable factors that influenced the rating:** Click or tap here to enter text.

## Appendix D

### FSU CSO Scholarship for Graduates of FSU-Authorized High Schools

The Ferris State University (FSU) Charter Schools Office (CSO) created the Momentum Endowed Scholarship and Enrollment Program for charter school students to help lower college costs. The scholarship is available to students graduating from any public school authorized by Ferris State University. Students that have graduated from an FSU-authorized public school academy and applied to FSU are automatically admitted to the University and earn a minimum \$3,500 scholarship.

#### Eligibility

To be eligible for a scholarship, students must meet the following criteria:

- The scholarship is available only to students attending FSU fulltime as an undergraduate, taking classes in-person or online.
- Students must be a graduate of a charter school authorized by FSU.
- Students must have a minimum 2.35 grade point average at the time of application.

#### Additional Information

- Preference will be given to eligible students who demonstrate financial need determined through the Free Application for Federal Student Aid (FAFSA)
- For fulltime students attending classes on campus, one half of the scholarship will be paid during the fall semester and the other half during the spring semester.
- The scholarship is renewable for up to four years, provided the recipient remains an undergraduate student and demonstrates satisfactory academic progress as specified by the Office of Student Financial Aid.
- If the scholarship is awarded to a freshman, it shall be renewable for a maximum of three additional years, with two years for sophomore and one year for a junior.



## Appendix E

### Common Terms and Acronyms

#### A

**Academic Achievement** – Either based on proficiency/benchmark scores or a comparison with student students.

- MSTEP sets proficiency scores. CSO wants a school's percentage of proficient students to be higher than your Composite District.
- SAT gives each student a score. The CSO wants to see the average score increase each year and the average score be equal or better than the Resident District.
- MAP tests give each student a Spring Achievement Percentile that compares the student's score with all other students in the United States that took that test. The CSO wants the average of the percentile scores to be increasing each year with a goal of being at the 50<sup>th</sup> percentile.

**Academic Growth** – The following assessments are used to monitor student academic growth:

- MSTEP provides Student Growth Percentile which determines how much a student grew from last Spring compared to similar students in Michigan. CSO wants average to be 40%.
- SAT gives each student a score. The CSO wants the average score to show a 30-point growth from the PSAT 10 scores.
- MAP provides Growth Percentile which compares student growth from Fall to Spring with students nationally. CSO wants average to be 50%.

#### C

**Charter Contract** – Legal agreement between the Ferris State University Board of Trustees and the Academy's Board of Directors for a specific term of years.

**Criminal History Record Information (CHRI)** –

Includes details about an individual's arrests, detentions, indictments, formal charges, and any dispositions arising from those charges, such as convictions, acquittals, dismissals, sentencing, correctional supervision, and release dates; essentially, it's a summary of someone's interactions with the criminal justice system.

**Contract Performance Report (CPR)** – Annual compilation of academic, operational, governance, compliance, financial, demographic and other information distributed to board members, school leadership, and CSO website.

**Composite District** – A proxy district using the weighted average of the public school districts where your Academy's students reside.

**CSO** – Charter Schools Office

#### E

**Educational Service Provider (ESP)** – A for-profit or non-profit organization that provides services to the Charter Academy and Board of Directors. Also called the Educational Management Company (EMP).

**Educational Service Provider Agreement** – Legal agreement/contract between the Educational Service Provider and the Academy's Board of Directors.

**ELA** – English Language Arts

**ELL** – English Language Learner

**Epicenter** – Web-based document management system for school and board documents. Academic, financial, operational and compliance data tracker

**Every Student Succeeds Act (ESSA)** – A US law that governs public education for grades K–12. The ESSA requires states to set high academic standards for reading and math. These standards are meant to prepare students for college and careers.

## F

**Family Education Rights and Privacy Act (FERPA)** – A federal law that protects the privacy of students' education records. FERPA applies to all schools that receive funding from the US Department of Education, including public and private schools at the elementary, secondary, and post-secondary levels.

**Ferris State University (FSU)** – A charter school authorizer.

**Freedom of Information Act** – A law that allows the public to request records from federal agencies.

**FTE** – Full-Time Equivalent

## I

**Individuals with Disabilities Education Act (IDEA)** – A law that ensures that students with disabilities are provided with a free, appropriate education that is tailored to their needs.

**Individualized Education Plan (IEP)** – A legal document that outlines a child's special education goals and services. IEPs are developed for children in public schools who need extra help and support.

**Intermediate School District (ISD)** – Sometimes called RESA, ESD, ESA, or RESD, an ISD assists local districts and charter schools with services and programs.

## L

**Local Agency Security Officer (LASO)** – Participant in the Criminal History Record Information (CHRI) process.

**Local Educational Agency (LEA)** – Refers to any traditional public school in Michigan

## M

**Measures of Academic Progress (MAP)** – CSO required assessment for grades 2-8 in reading and math. Nationally normed. Administered in Fall, Winter (optional) and Spring. Boards receive Fall to Spring growth data and Spring achievement data.

**Michigan Association of Public School Academies (MAPSA)** – Association that provides support and advocacy for Michigan charter schools.

**Michigan Council of Charter School Authorizers (MCCSA)** – A council that serves as a collaborative, non-profit, non-partisan professional organization that allows for sharing of issues, ideas, resources and best practices among all public charter school authorizers working in the state.

- Members include the charter school offices at Bay Mills Community College, Central Michigan University, Detroit Public Schools Community District, Eastern Michigan University, Ferris State University, Grand Valley State University, Lake Superior State University, Northern Michigan University, Oakland University and Saginaw Valley State University.

**Michigan Compiled Law (MCL)** – Laws that are passed by the Michigan Legislature, which consists of the Michigan House of Representatives and the Michigan Senate.

**Michigan Department of Education (MDE) –**

Provides services, including a PSA Unit for support, and receives many mandated reports from your school.

**Michigan High School Athletic Association (MHSAA) –** A service organization for high school sports in Michigan.

**Mid-Contract Review –** Midway through the length of the Charter Contract, the CSO will conduct a mid-contract review. During the mid-contract review, which is conducted virtually, the CSO team will interview academy representatives about current initiatives and planning in each of the four pillars: Academics, Fiscal, Compliance, and Operations.

**Michigan Student Test of Educational Progress (MSTEP) –** A standardized test taken by students in grades 3-8 and 11 in the spring. Produces statewide averages for growth and proficiency. The CSO focuses on English Language Arts (ELA) and Math scores.

**N**

**National Charter Schools Institute (NCSI) –** A 501(c)3 nonprofit organization that provides support and training for people and organizations in the charter community.

**O**

**Open Meetings Act (OMA) –** A law that requires public bodies to hold meetings that are open to the public. The OMA applies to local governing bodies like boards, commissions, and committees.

**P**

**PSA –** Public School Academy

**Preliminary Scholastic Aptitude Test (PSAT) –** Administered to students in grades 9 and 10.

**PAM –** Pupil Accounting Manual

**Q**

**Quality Performance Resource Group (QPRG) –** A vendor of the CSO that conducts school leadership and staff personnel verification audits in the Fall, Winter and Spring

**R**

**Reauthorization Review –** Prior to the expiration of the Charter Contract, the CSO will conduct an in-person reauthorization review to determine if a subsequent Charter Contract is recommended, and for how many years.

**Resident District –** The traditional public school district in which your academy is located

**S**

**Scholastic Aptitude Test (SAT) –** A standardized test required by the State of Michigan for all 11<sup>th</sup> graders and 12<sup>th</sup> graders who did not take the test in 11<sup>th</sup> grade. Nationally normed. The PSAT and SAT are a part of the College Board organization.

**School Support Protocol –** Structured processes the CSO utilizes to support the Academy in the areas of academics, fiscal, operations, and governance.

**U**

**USDOE –** United States Department of Education



FERRIS STATE  
UNIVERSITY

---

CHARTER SCHOOLS OFFICE

# Charter Contract Handbook

**Table of Contents**

Purpose of This Handbook ..... 3

Overview of the Charter Contract ..... 3

Acronyms and Abbreviations ..... 3

Charter Schools Office Policies ..... 4

    Educational Service Provider Policies ..... 4

    Facility Finance & Property Acquisition Policy ..... 4

    Dissolution Policy ..... 5

    Nonessential Elective Course Policy ..... 5

    Applicability and Enforcement of Policies ..... 5

Tab A: Board of Trustees Resolutions ..... 6

Tab B: Contract Terms and Conditions ..... 6

Tab C: Contract Schedules ..... 7

    Schedule 1: Articles of Incorporation ..... 7

    Schedule 2: Organizational Bylaws ..... 7

    Schedule 3: Fiscal Agent Agreement ..... 7

    Schedule 4: Oversight Agreement ..... 8

    Schedule 5: Description of Staff Responsibilities ..... 8

    Schedule 6: Physical Plant Description ..... 9

    Schedule 7: Required Information for a Public School Academy ..... 9

    Schedule 8: Information to Be Provided by the Academy and/or ESP ..... 10

## **Purpose of This Handbook**

This handbook provides board members, academy leaders, and CSO staff with a practical guide to understanding the Charter Contract. It explains how the contract is organized, what it requires, and how it supports strong governance and accountability.

This handbook is intended as a reference tool. In the event of any conflict, the Charter Contract and applicable law control.

---

## **Overview of the Charter Contract**

The Charter Contract is the formal agreement between Ferris State University (FSU), acting as the authorizer, and the public school academy board. It defines the responsibilities of both parties and ensures the academy operates in compliance with Michigan law.

The Charter Contract is organized into four main parts:

- **Ferris State University Charter School Office Policies**
- **Tab A: Board of Trustees Resolutions**
- **Tab B: Contract Terms and Conditions**
- **Tab C: Contract Schedules, including Bylaws**

Each part plays a distinct role in defining governance, accountability, educational programming, and operational expectations.

---

## **Acronyms and Abbreviations**

Charter Schools Office (CSO)

Educational Service Provider (ESP)

Ferris State University (FSU)

## **Charter Schools Office Policies**

This section outlines policies that apply to all academies authorized by FSU. These policies establish required standards in key operational areas. Compliance with these policies is a condition of authorization and continued operation.

The policies address the following areas:

### **Educational Service Provider Policy**

This policy governs the use of Educational Service Providers (ESPs). It ensures transparency, accountability, and board independence when contracting with an ESP.

#### **Key provisions include:**

- The academy board retains independent authority and oversight
  - Standards for ESP contract approval, amendment, and termination
  - Disclosure and conflict-of-interest requirements
  - Expectations for performance monitoring and evaluation
- 

### **Facility Finance & Property Acquisition Policy**

This policy addresses how academies finance, lease, or purchase facilities. It is designed to protect public assets and support sound financial decisions.

#### **Key elements include:**

- Authorizer review and approval of facility agreements
- Disclosure of ownership interests and related-party transactions
- Requirements related to debt, financing terms, and long-term obligations
- Compliance with state and federal law

## **Dissolution Policy**

This policy outlines procedures that apply if an academy ceases operations or the Charter Contract is terminated. It ensures an orderly wind-down and protection of public funds.

### **Key provisions include:**

- Board responsibilities during dissolution
  - Asset distribution requirements
  - Records retention and transfer
  - Coordination with the authorizer and state agencies
- 

## **Nonessential Elective Course Policy**

This policy governs nonessential elective courses that are not part of the core academic program. It ensures these courses support, rather than detract from, the academy's educational mission.

### **The policy addresses:**

- Criteria for identifying nonessential electives
  - Board approval and oversight
  - Funding and fee limitations
  - Compliance with instructional and accountability standards
- 

## **Applicability and Enforcement of the Policies**

These policies apply to all FSU-authorized academies. The CSO monitors compliance and works with academy boards to address concerns when they arise. When necessary, corrective actions may be required under the Charter Contract, up to and including suspension, revocation, or termination as permitted by law.

## **Structure of the Charter Contract**

The Charter Contract is organized into the following tabs, each serving a distinct function:

- Tab A: Board of Trustees Resolutions
- Tab B: Contract Terms and Conditions
- Tab C: Contract Schedules

Together these tabs define the authority, responsibilities, and operational expectations that guide the academy's work.

### **Tab A: Board of Trustees Resolutions**

This section documents formal actions taken by the FSU Board of Trustees to issue, amend, or continue a Charter Contract. These resolutions provide the legal authority for the contract and reflect institutional oversight.

### **Tab B: Contract Terms and Conditions**

The Terms and Conditions establish the framework governing the relationship between FSU and the academy board. This section outlines expectations, responsibilities, and operational requirements.

#### **Key areas include:**

- Definitions of key contractual and statutory terms
- FSU's authority and responsibilities as authorizer
- Responsibilities of the academy board as a public body
- The legal relationship between the academy and the University
- Governance structure and independence requirements
- Confirmation that the academy may not charge tuition
- Compliance with applicable laws and authorizer policies
- Procedures for contract amendments
- Circumstances and processes for suspension, revocation, termination, and dissolution

This section forms the foundation for authorizer oversight and accountability.

## **Tab C: Contract Schedules**

The Contract Schedules provide detailed, academy-specific documentation required for operation and oversight.

### **Schedule 1: Articles of Incorporation**

The Articles of Incorporation legally establish the academy as a nonprofit corporation in Michigan and outlines required filing and annual reporting obligations.

### **Schedule 2: Organizational Bylaws**

The Bylaws define how the academy board operates and exercises its authority as a public body. They establish expectations for governance, financial oversight, and ethical conduct.

#### **Key areas addressed include:**

- Contract authority and execution
- Debt and financial obligations
- Payment authorization and financial controls
- Deposits and use of financial institutions
- Gifts and transferred securities
- Ethics and related-party contracts

These provisions ensure the board retains control over financial decisions, avoids conflicts of interest, and protects public funds.

### **Schedule 3: Fiscal Agent Agreement**

The Fiscal Agent Agreement designates FSU as the academy's fiscal agent solely for receiving and transferring State School Aid payments. The Michigan Department of Treasury acknowledges this agreement.

#### **Key elements include:**

- FSU's limited role in receiving and transferring funds
- Procedures for timely transfer of State School Aid payments
- Clarification that FSU does not determine aid amounts or approve expenditures
- Requirements for directing payments to third parties
- Academy board responsibility for lawful use of funds and repayment of overpayments
- Recordkeeping requirements
- Limitations on fiscal agent liability

This agreement clarifies the limited fiscal role of FSU and reinforces the academy board's responsibility for financial management and compliance.

#### **Schedule 4: Oversight Agreement**

The Oversight Agreement defines the University's oversight role and the academy board's compliance responsibilities. It establishes how FSU monitors performance and legal compliance.

##### **Key areas include:**

- Ongoing review of governance, academics, finances, staffing, safety, and compliance
- Required reporting and documentation to the CSO
- Review of facilities, leases, financing, and intercept requests
- Maintenance of oversight records
- Payment of a 3% State School Aid administrative fee

This agreement confirms the University's role as authorizer and the academy board's responsibility to operate in compliance with the Charter Contract and state law.

#### **Schedule 5: Description of Staff Responsibilities**

This schedule outlines the academy's organizational structure and staffing model. It includes position descriptions, qualifications, evaluation systems, performance criteria, and reporting relationships.

## **Schedule 6: Physical Plant Description**

**This schedule documents information related to school facilities, including:**

- Building location and site plans
- Floor plans
- Facility leases or financing agreements
- Certificates of Use and Occupancy

Material changes to the physical plant generally require prior authorizer approval.

## **Schedule 7: Required Information for a Public School Academy**

This schedule contains academy-specific information required in every Charter Contract. Every public school academy contract must include these elements to ensure statutory compliance. It describes governance, educational programming, and operational structure.

**Sections include:**

- Section a: Governance Structure – this is an established Ferris State University Charter Schools Office policy provided as a component of the contract. It describes the academy’s governance model, including board authority and organizational structure.
- Section b: Educational Goals and Programs – this is an established Ferris State University Charter Schools Office policy provided as a component of the contract. It outlines the academy’s educational mission, goals, and instructional programs.
- Section c: Curriculum – identifies the curriculum framework and instructional approach used to achieve the academy’s educational goals. The Michigan Department of Education Public School Academies Unit Curriculum Requirement Form can be found in Epicenter and is used to guide academies on curriculum requirements in accordance with applicable law.
- Section d: Methods of Pupil Assessment – this is an established Ferris State University Charter Schools Office policy provided as a component of the contract. It explains how student progress and academic performance are measured and evaluated.
- Section e: Admission Policy and Criteria – this is an established Ferris State University Charter Schools Office policy provided as a component of the contract. It provides the academy’s student admission process and enrollment eligibility standards in compliance with law.

- Section f: Public Notice of Enrollment Procedures – describes how the academy provides public notice regarding enrollment opportunities and application procedures. It is an established Ferris State University Charter Schools Office policy provided as a component of the contract.
- Section g: School Calendar and School Day Schedule – defines the instructional calendar and daily schedule, including required instructional time.
- Section h: Age or Grade Range Served – specifies the grade level or age groups the academy is authorized to serve.

### **Schedule 8: Information to Be Provided by the Academy and/or ESP**

This schedule outlines the academy’s obligation to collect, maintain, and disclose information about governance, operations, and finances to the public and the CSO, as required by state law. Required materials include board documents, financial reports and audits, contracts, policies, facility, and safety records, staffing information, and other legally required disclosures.

These requirements promote transparency and help ensure responsible operation in compliance with the Charter Contract and state law.

