



## FY 2019 Authorizer Annual Report

### Authorizer Information

**Name of Authorizing Organization:** Student Achievement Minnesota LLC

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#### Authorizer Summary:

Student Achievement Minnesota LLC (SAM), established in 2010, is a “single-purpose authorizer”: by law, it conducts no activities other than authorizing public charter schools. SAM’s mission is to improve student achievement through quality authorization of charter schools. SAM’s vision is to authorize high-quality charter schools demonstrated to increase student achievement when measured against resident district or state average performance.

SAM authorized three charter schools in 2018-2019 serving approximately 980 students, kindergarten through twelfth grades. Math and Science Academy (MSA) a suburban school is located in Woodbury. Northeast College Prep (NECP) and West Side Summit (WSS), inner-city schools are located in Northeast Minneapolis and West St. Paul respectively.

Math and Science Academy which serves grades six through twelve is in its nineteenth year of operation. Student enrollment for 2018-2019 peaked at 526. School demographics and diversity continue to grow. Attrition is low and school demand continues to increase; 452 students on waiting list. The school continues to significantly outperform the local district and the state average in school-wide reading, math, and science proficiency on MCA assessments by at least 25 points. All seniors who started the twelfth grade in SY19 graduated on time. The school’s financial status is strong and the fund balance continues to grow. SAM issued the school a five-year contract renewal due to its strong performance.

Northeast College Prep, K through seven school, in its fifth year of operation serves approximately 319 students. The school is very diverse racially and ethnically. The school added seventh grade in 2018-2019, continuing its growth trajectory of adding an additional grade each year through 8<sup>th</sup> grade. The school continues to perform below the state average but, slightly better than the resident district. Parent satisfaction remains healthy. SAM issued the school a four-year contract renewal because of academic and operational inadequacies.

West Side Summit, a K through seven school, in its sixth year of operation serves a predominately Hispanic student population (93%). Seven percent (7%) of the student population was identified as homeless. During the six years of operation WSS has failed to satisfactorily improve and advance the implementation of the school's academic program, teacher instruction, and increase pupil learning. In SY19, minimal gains were made to increased school-wide reading and math proficiency. The school consistently performed significantly below the resident district and state average in proficiency on MCA reading, math and science assessments. WSS' governing board voted to close the school effective June 30, 2019 because of acute academic deficiencies and forecasted financial difficulties. SAM supported this courageous and right decision.

Contributions to SAM are tax deductible under section 501(c)(3) of the Internal Revenue Code, and SAM is registered with the Minnesota Attorney General's office. SAM welcomes existing and developing organizations with programs demonstrated to improve student achievement to apply to SAM for authorization.

## Authorizer Processes

### New Charter School Applications in FY 2019 (B.1)

**Did your organization review any new charter school applications in FY 2019?**

Yes

**If no, please provide an explanation:**

N/A

**If yes, complete the table below for each application:**

Name of Charter School Applicant	Authorizer Approval or Disapproval	Minnesota Department of Education (MDE) Approval or Disapproval	If Disapproved, Reason(s) for Disapproval	Application Withdrawn by Applicant
American Technical Academy	Disapproval	N/A	Low Rating by External Reviewers and Incomplete Application	N/A
Aspire Academy	Disapproval	N/A	Failed Desk Screening (1 <sup>st</sup> Stage of Review Process); Incomplete Application	N/A
Academy of Science & Citizenship	Disapproval	N/A	Failed Desk Screening (1 <sup>st</sup> Stage of Review Process); Incomplete Application	N/A
MN Academy of Choice High School	Disapproval	N/A	Failed Desk Screening (1 <sup>st</sup> Stage of Review Process); Incomplete Application	N/A

**New Charter School Openings in FY 2019 (B.2)**

**Did your organization engage in ready-to-open activities in FY 2019?**

No

**If no, please provide an explanation:**

SAM had no schools approved or scheduled to open in FY19.

**If yes, complete the table below for each charter school scheduled to open:**

Name of Charter School Projected to Begin Serving Students in FY 2019	Projected Opening Date	Did this School Open as Planned?	If No, Provide Reason(s) and Revised Projected Opening Date
N/A	N/A	N/A	N/A

### Charter School Expansion Applications in FY 2019 (B.2)

Did your organization review any site and/or grade expansion applications in FY 2019?

Yes

If no, please provide an explanation:

If yes, complete the table below for each application:

Name of Charter School	Proposed Additional Grades to be Served and/or Location of New Site	Authorizer Approval or Disapproval	MDE Approval or Disapproval	If Disapproved, Reason(s) for Disapproval	Application Withdrawn by Applicant
Math and Science Academy	Additional Site 8400 Woodbury Crossing, Woodbury*	N/A	*Per MDE consultation, approval for a fourth site was not necessary because MDE approved expansion in MSA’s “original” charter application. Also, the fourth building was in proximity to adjacent buildings.		Yes

### Official Early Learning Program Recognition Requests in FY 2019 (B.2)

Did your organization review any requests for official early learning program recognition in FY 2019?

No

**If no, please provide an explanation:**

SAM received no Early Learning Program applications in FY19.

**If yes, complete the table below for each request:**

Name of Charter School	Early Learning Program Seeking Recognition	Authorizer Approval or Disapproval	MDE Approval or Disapproval	If Disapproved, Reason(s) for Disapproval	Application Withdrawn by Applicant
N/A	N/A	N/A	N/A	N/A	N/A

### Charter School Change in Authorizer Requests in FY 2019 (B.2)

**Did your organization review change in authorizer requests in FY 2019?**

No

**If no, please provide an explanation:**

SAM received no applications for a change in charter school authorizer in FY19.

**If yes, complete the table below for each request:**

Name of Charter School	Authorizer Charter School Requested to Transfer From	Authorizer Approval or Disapproval	MDE Approval or Disapproval	If Disapproved, Reason(s) for Disapproval	Application Withdrawn by Applicant
N/A	N/A	N/A	N/A	N/A	N/A

### Charter Contract Renewals in FY 2019 (B.9)

**Did your organization engage in charter renewal activities in FY 2019?**

Yes

**If no, please provide an explanation:**

If yes, complete the table below for each school:

Name of Charter School	Was Contract Renewed?	If Yes, Term of Contract Renewal	If No, Reason(s) for Nonrenewal
Math and Science Academy	Yes	<u>5 Year Renewal</u> 07/01/2019- 6/30/2024	
Northeast College Prep	Yes	<u>4 Year Renewal</u> 07/01/2019- 6/30/2023	

## Additional Authorizer Activities

### Authorizing Leadership and Staff Skill Development (A.5)

Describe how your organization built the knowledge and skill base of its authorizing leadership and staff through professional development over the past year.

SAM’s FY19 professional development initiatives focused on increasing and enhancing charter school oversight, authorizing practices, and student achievement. SAM meets Friends of Education, charter authorizer mentor, regularly to disseminate information, strategies, best practices and authorizing pitfalls. Gaining a greater understanding of race equity and educational equality is a high priority moving forward.

In FY2019, SAM personnel attended:

Professional Development	When	Student Achievement Minnesota Personnel Attending		Area Addressed			Purpose
		Staff	Leadership	Authorizer Practices / Oversight	School Operations	Student Achievement	
MDE Annual Authorizer Conference	7/19/18		✓	✓			
Uncommon Schools	8/2/18 8/3/18		✓	✓		✓	Leading Student Culture / Best Practices

							Real Time Teacher Feedback
Public Agency Training Council	8/29/18 - 8/31/18		✓	✓	✓		Response to School Violence and Safety
MDE	9/10/18		✓	✓			High Quality Schools
MEEP Superintendent Symposium (1)	9/21/18		✓	✓		✓	Race Equity in Education
MEEP Superintendent Symposium (2)	9/28/18		✓	✓		✓	Race Equity in Education
Uncommon Schools	11/6/18 11/7/18		✓	✓	✓	✓	DDI Teacher / Instructional Coaching
MDE	11/16/18		✓	✓			High Quality Schools
MDE	1/18/19		✓	✓			Data Privacy
MDE MAPES	1/22/19		✓	✓			Authorizing Review Process
MDE	1/29/19		✓	✓	✓		Data Practices & Record Retention
Friends of Education Director's Meeting	2/28/19		✓	✓	✓	✓	Teacher/ Coach Observation Tracking Legal and Practical Communication
Learning & the Brain	5/3/19 5/4/19 5/5/19		✓	✓		✓	Understanding of autistic, social and emotional learning
Friends of Education School Board Best Practices & Networking	5/16/19		✓	✓			School Board Best Practices and Exchange

## Authorizer Self-Evaluation (A.9)

**Describe how your organization self-evaluated its internal ability (capacity, infrastructure, and practices) to oversee the portfolio of charter schools over the past year.**

SAM's evaluation of its processes and practices is constant in order to implement quality authorizing practices and procedures. Authorizing practices are aligned with MACSA and NACSA standards to ensure quality authorizing. SAM's capacity and practices are reviewed routinely so that authorizing deficiencies and professional development needs are identified and resolved in a timely manner. SAM's portfolio size and staffing did not change in 2018-2019 and no issues or concerns surfaced. Suggesting, authorizing capacity, infrastructure and practices were adequate at this time.

## Authorizer High Quality Authorizing Dissemination (A.10)

**Describe how your organization disseminated best authorizing practices and/or assisted other authorizers in high quality authorizing over the past year.**

SAM is a member of the MN Association of Charter School Authorizers (MACSA) and regularly participates in the organization's monthly meetings where other school authorizers gather to share information, brainstorm, problem solve and advocate for high-quality authorizing. SAM (Liz Wynne) chaired the MACSA Standards and Principles Committee which resulted in the publishing and distribution of charter school authorizing principles and standards for MN charter school authorizers; *MACSA Charter School Authorizing Principles and Standards*. SAM presented at the MDE Charter School Boot Camp on 12/11/2018 and 1/16/2019 at the invite of MDE. This provided an opportunity to share with persons wanting to start a school accountability practices/standards and operational pitfalls. SAM facilitated a monthly meeting with interested authorizers (cohort) to review the charter application process and to identify application criteria deficiencies to mitigate school closure. These findings were shared with the MACSA membership.

Additionally, SAM meets with Friends of Education executive director usually every week to discuss authorizing standards, successes, challenges, opportunities, and areas in need of attention.

## Charter School Support, Development, and Technical Assistance (B.7)

**Describe how your organization supported its portfolio of charter schools through intentional assistance and development offerings over the past year.**

SAM is committed to providing high quality professional development and technical assistance to its portfolio of schools. Professional development topics/subjects are based on authorizer observations and solicited school input. SAM also takes a keen interest in the development of its school leaders. School directors and assistant principals try to meet quarterly at SAM's request to network and mitigate "aloneness". Technical assistance is provided free of charge and not mandated. SAM monitors the impact of professional development and technical assistance provided.

### Professional Development Opportunities (2018-2019)

SAM in partnership with Friends of Education provided the following professional development:

- *Uncommon Schools: 2018 August 2<sup>nd</sup> and 3<sup>rd</sup> – School Culture and Teacher Feedback*
- *Uncommon Schools: 2018 November 6<sup>th</sup> and 7<sup>th</sup> – Instructional Coaching*



- *Board of Directors Networking & Dissemination of Best Practices: 2019 May 16<sup>th</sup>*

School Leadership Development

SAM met with school directors and principals in the fall and spring (10/23/18 and 2/21/19) to network, share leadership challenges, problem solve and communicate lessons learned. SAM begins the meeting with a predetermined educational topic that impacts school success such as race and educational equity, generational communication differences, school violence and safety.

Direct Technical Assistance

SAM retained a 0.2 consultant to assist schools with instructional coaching, data driven instruction, and data analysis. NECP used this service to examine state standard and assessment alignment and ascertain the rigor of assessment questions. WSS sought a deeper analysis of test data for students continuously enrolled in the school to better interpret academic growth and progress.

**High Quality Charter School Replication and Dissemination of Best School Practices (B.8)**

**Describe how your organization planned and promoted, within its portfolio, the model replication and dissemination of best practices of high-performance charters schools over the past year.**

SAM’s school portfolio is small, thus a “direct” approach is taken disseminating and replicating effective practices that improve teacher instruction, increases pupil learning and enhances school efficiency. SAM approaches the dissemination of best practices by meeting with schools as a cohort and individually. As previously stated, SAM used purposely scheduled meeting to introduce proven practices and strategies, share best practices and offer solutions.

Individual director meetings concentrated on the school’s MCA performance, Annual & WBWF Report, school selected assessment results and data driven instruction as it pertained to increased student achievement, improved school culture, teacher instruction and operations efficiency. A professional development depository is housed on SAM’s portal as added support for schools.

**Portfolio Information**

**General Charter School Portfolio Data (as of June 30, 2019)**

**Preoperational Charter Schools in Authorizer’s Portfolio:**

Name of Charter School	Charter School LEA Number (if assigned)	Charter School Program (CSP) Grant Recipient	Grade Levels Approved to Serve	Projected Enrollment when Fully Enrolled	Proposed Location	Proposed Opening Date
N/A	N/A	N/A	N/A	N/A	N/A	N/A

**Operational Charter Schools in Authorizer’s Portfolio:**

Name of Charter School	Charter School LEA Number	CSP Grant Recipient	Grade Levels Served in FY 2019	Location	Charter School Demographic and Enrollment Information	Charter School’s World’s Best Workforce Report
Math and Science Academy	4043	No	6-12	8430 Woodbury Crossing, Woodbury, MN 55125	<a href="#">Hyperlink to MN Report Card</a>	<a href="#">Hyperlink to School’s WBWF Report</a> (Annual Report)
Northeast College Prep	4219	Yes	K-7	300 Industrial Blvd. NE, Minneapolis, MN 55413	<a href="#">Hyperlink to MN Report Card</a>	<a href="#">Hyperlink to School’s WBWF Report</a> (Annual Report)
West Side Summit Charter School	4212	Yes	K-8	497 Humboldt Avenue, St Paul, MN 55107	<a href="#">Hyperlink to MN Report Card</a>	N/A School Closure

**MDE Officially Recognized Early Learning Programs at Charter Schools in Authorizer’s Portfolio:**

Name of Charter School	Officially Recognized Early Childhood Health and Developmental Screening Program	Officially Recognized Instructional Preschool Program to provide early childhood education and preparation for transition to kindergarten for children ages 3-5	Officially Recognized Instructional Prekindergarten Program for four-year-olds to prepare children for entry into kindergarten the following year
N/A	N/A	N/A	N/A

**Charter Schools with Charter Management Organization (CMO)/Education Management Organization (EMO)**

Name of Charter School	Management Organization Name	Employer Identification Number (EIN)	Management Organization Address Location	Management Organization Address Mailing	Management Organization Type
N/A	N/A	N/A	N/A	N/A	Choose an item

**Charter School Portfolio Activity in FY 2019**

In FY 2019, did any charter schools leave your organization’s portfolio and transfer to another authorizer during or at the end of the year?

No

If yes, complete the table below for each applicable school:

Name of Charter School	Charter School LEA Number	New Authorizing Organization	Effective Date of Transfer
N/A	N/A	N/A	N/A

In FY 2019, did your organization terminate or revoke the charter contract for any charter school before the end of the contract term?

No

If yes, complete the table below for each applicable school:

Name of Charter School	Charter School LEA Number	Reason(s) for Contract Termination	Effective Date of Contract Termination
N/A	N/A	N/A	N/A

**In FY 2019, did any charter schools voluntarily close (i.e., closure was initiated by the school) during or at the end of the year?**

Yes

**If yes, complete the table below for each applicable school:**

Name of Charter School	Charter School LEA Number	Reason(s) for Closure	Effective Date of Closure
West Side Summit Charter School	4212	Acute academic deficiencies and financial instability	06/30/2019

## Charter School Portfolio Performance

### World’s Best Workforce

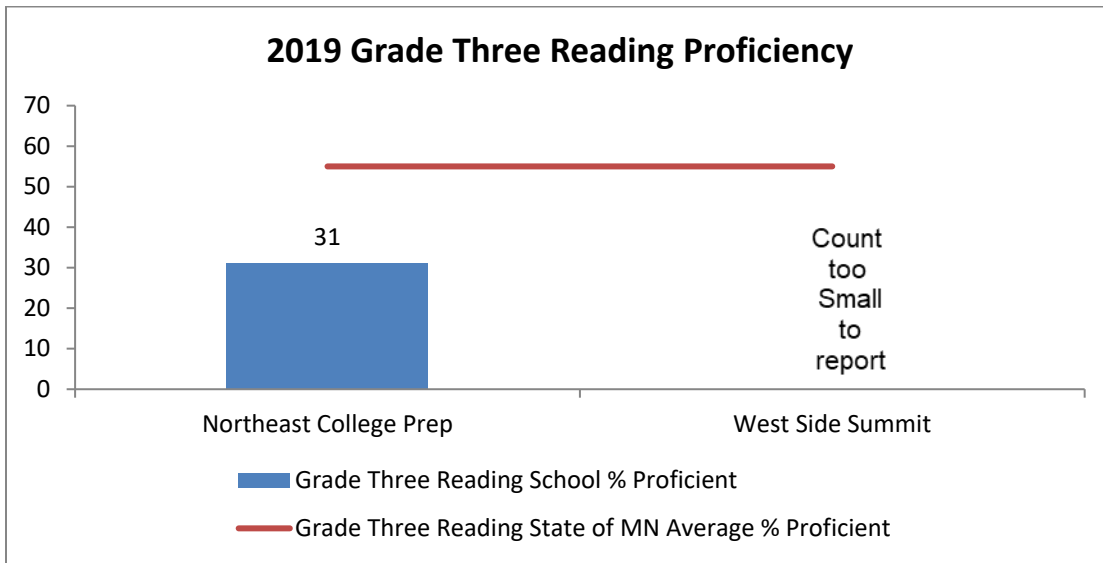
**Describe how your organization incorporates achievement of World’s Best Workforce goals in its ongoing oversight and evaluation of charter schools.**

The WBWF plan provides added insight into whether schools are making strides to increase the student performance based on rigorous standards, key indicators and benchmarks. SAM includes WBWF goals in the charter contract and school oversight practices. WBWF goals include Closing the Achievement Gap (FRL, ELL and Spec Ed); 3<sup>rd</sup> Grade Reading Level; College Readiness/ACT; State Assessment and Proficiency Greater than State Average; and Graduation Rate (if applicable). WBWF reports are posted on the school’s website to ensure regulation compliance and to disseminate information to empower parents and the public, a solicitation of increased accountability.

SAM monitors WBWF progress, growth and goal achievement in conjunction with MCA proficiency. This is done through the review of board meeting minutes, the school’s annual report, annual school site visits, MCA results and WBWF outcomes. SAM tracks the frequency in which the governing board is briefed by administration on student achievement, WBWF results and the meeting charter contract goals. SAM meets with the school director and board chair when warranted to address academic deficiencies, concerns and areas in need of improvement.

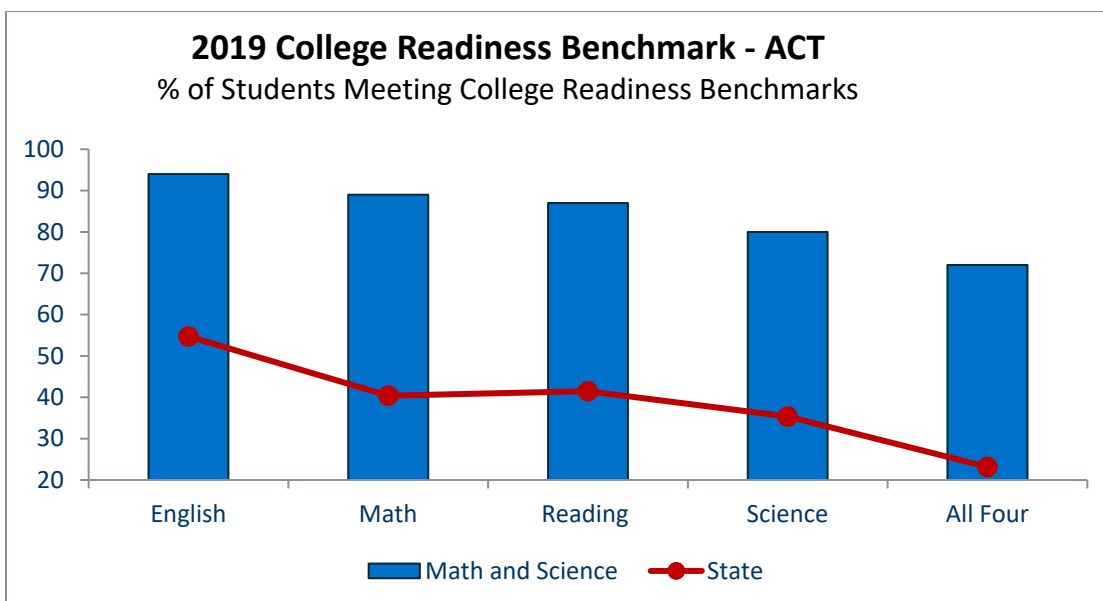
#### **World Best Workforce Goal: All Third Graders Can Read at Grade Level**

WSS and NECP did not achieve the WBWF’s , “all third graders can read at grade level” goal. Continuous school Improvement Plans are required by SAM to improve deficiencies and to increase student achievement and school success. NECP included 3<sup>rd</sup> grade reading proficiency goals in the school’s SY20 4-Year Continuous Improvement Plan recognizing an urgency to increase proficiency. School administration determined in their performance analysis that added instructional coaches were needed to better accommodate teachers instructionally, boost academic rigor and ensure standards mastery. SAM provided technical support to the schools as requested.



**World Best Workforce Goal: Graduation Rate and College Readiness**

MSA does an exceptional job preparing students for future endeavors. Students are graduating at a very high rate and ready to tackle college level coursework. SY19 ACT results show students are consistently performing higher than the state in all content areas. The ACT composite score of 27.1 significantly surpassed the state composite score of 21.4. Seventy-two percent (72%) of students tested ready for college coursework compared to the state’s results of 30%. Per the MDE 2018-2019 North Star Report, MSA’s four-year graduation rate for 2018 was 100% compared to the state’s four-year graduation rate of 83%. Sixty percent (60%) of students earned one year of credit within two years of enrollment in an IHE (Institution of Higher Education) compared to the state IHE average of just 21%. Eighty-seven percent (87%) of students who took advanced placement tests achieved a score of 3 or higher.



### **World Best Workforce Goal: All Achievement Gaps Between Students Are Closed**

All schools failed to achieve the WBWF achievement gap goal. How best to address the needs of changing and diverse school demographics is an ongoing discussion with school leaders. SAM offers technical assistance to schools recognizing school resources are often limited and inadequate to conquer the challenges. SAM participated in equity and educational equality professional development to gain a greater understanding of the challenges to better support schools.

### **Academic Performance**

**Present outcome data regarding key academic performance indicators your organization used when evaluating your portfolio of charter schools. Provide a narrative analysis of this data, indicating strengths and areas for improvement.**

SAM used MCA proficiency/growth, charter contract academic goals, North Star Accountability, WBWF goals and school selected academic data to accurately evaluate student learning and academic achievement. Specific attention is given to how the school is performing when compared to comparable school demographics, the local district and state averages. SAM believes school stability and leadership capacity significantly impacts the academic performance of the school.

MSA is high performing and consistently demonstrates a stellar academic performance. The school significantly outperformed the local district and the state average in school-wide reading, math, and science proficiency on state assessments (MCA), averaging 25 points higher. High academic growth consistently exceeds low academic growth. When compared to neighborhood high schools with comparable demographics, MSA was the only school to score at least 88% in all three MCA subject areas. The high school graduation rate remained high. Students scored the highest average in the state on the ACTs for a second year, suggesting strong college readiness. Contract academic goals were met.

NECP continued to perform below the state average but, slightly better than the resident district. Small gains were made in school-wide reading, math, and science proficiency. The school significantly outperformed the state on ELP progress and target goals. WBWF and charter contract goals were not achieved. SAM's ongoing conversations with the school to improve student achievement include the alignment of curriculum and standards, implementation of data driven instruction and student expectations.

WSS continued to perform significantly below the resident district and state average in school-wide reading, math and science proficiency. Minimal gains were made to increased reading and math proficiency. The school failed to adequately meet the needs of students, advance the academic program, improve teacher instruction and address school leadership deficiencies. SAM's Notices of Concern outlining issues regarding student behavior, academic rigor, teacher instruction and student expectations were minimized by school leadership. Thus, student learning was significantly impacted.

# of SAM schools Achieving Indicators / # SAM schools with reportable results

2019 | 2018 | 2017 | 2016

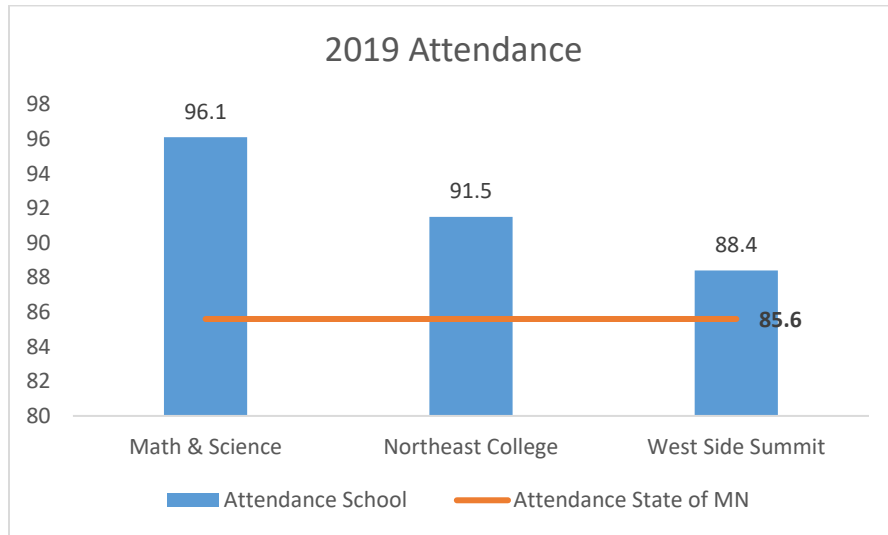
Academic Indicators		2019	2018	2017	2016
	MCA Proficiency > resident district	1/3	1/3	1/3	1/3
	MCA Proficiency > state average	1/3	1/3	1/3	1/3
	On-track growth > state average	1/3	1/3	1/3	1/3
	FRL proficiency rate > state FRL proficiency rate	1/3	1/3	1/3	0/2

### North Star Accountability System

North Star Accountability System for Schools and Districts - In Support of Every Student Succeeds Act (ESSA) Accountability Indicators:

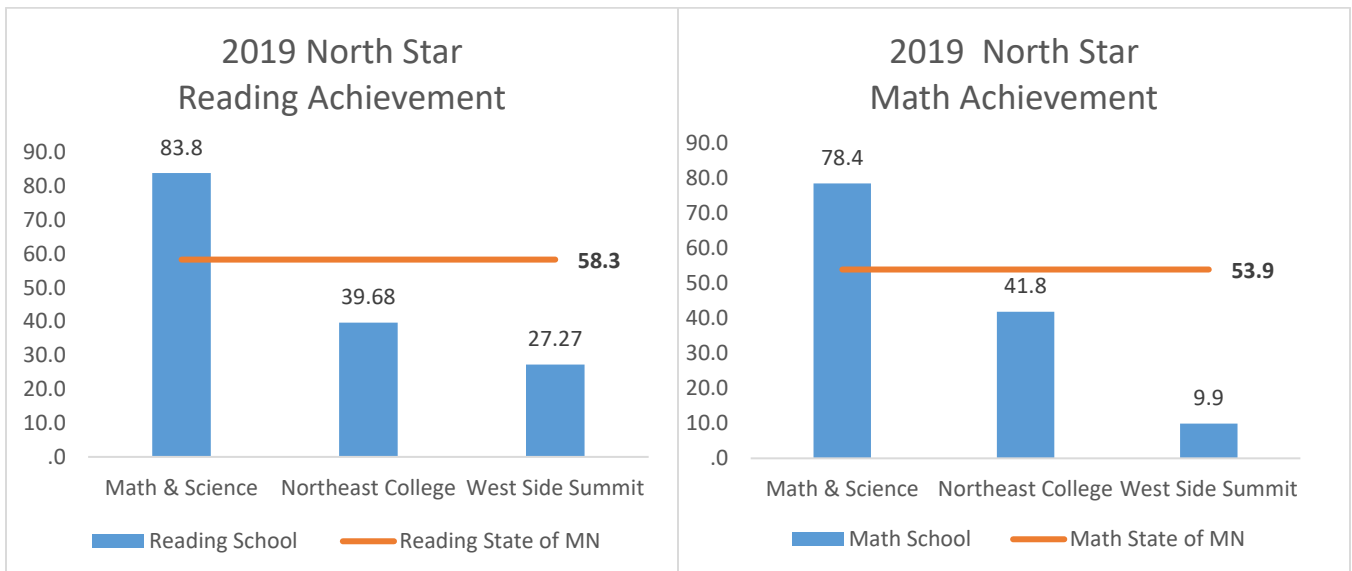
	State	MSA	NECP	WSS
Continued Attendance	85.4	96.1	91.5	88.4
Achievement				
• Reading	58.3	83.8	39.7	27.3
• Math	53.8	78.4	41.8	9.9
Math Progress				
• Improved & Maintained	62.7	72.	48.3	18.9
• Decreased	37.3	27.5	51.7	81.1
Reading Progress				
• Improved & Maintained	66.9	78.8	60.	43.6
• Decreased	33.1	21.2	39.	56.4
ELL Progress Toward Target	61.4	N/A	70.4	59.0
ELL Met Target	40.1	N/A	44.3	38.1
Graduation Rate (year 2018 data from the prior year)				
• 4 Year	83.	100	NA	NA
• 7 year	NA	NA		
College Readiness (High school graduation year 2018)				
• IHE Enrolled After 16 Months	63.0	83.0	NA	NA
• Earned One Year Credit Within 2 Years	21.0	60.0		
Participation	97.1	100.0	99.2	99.0

### Students Attending School Regularly



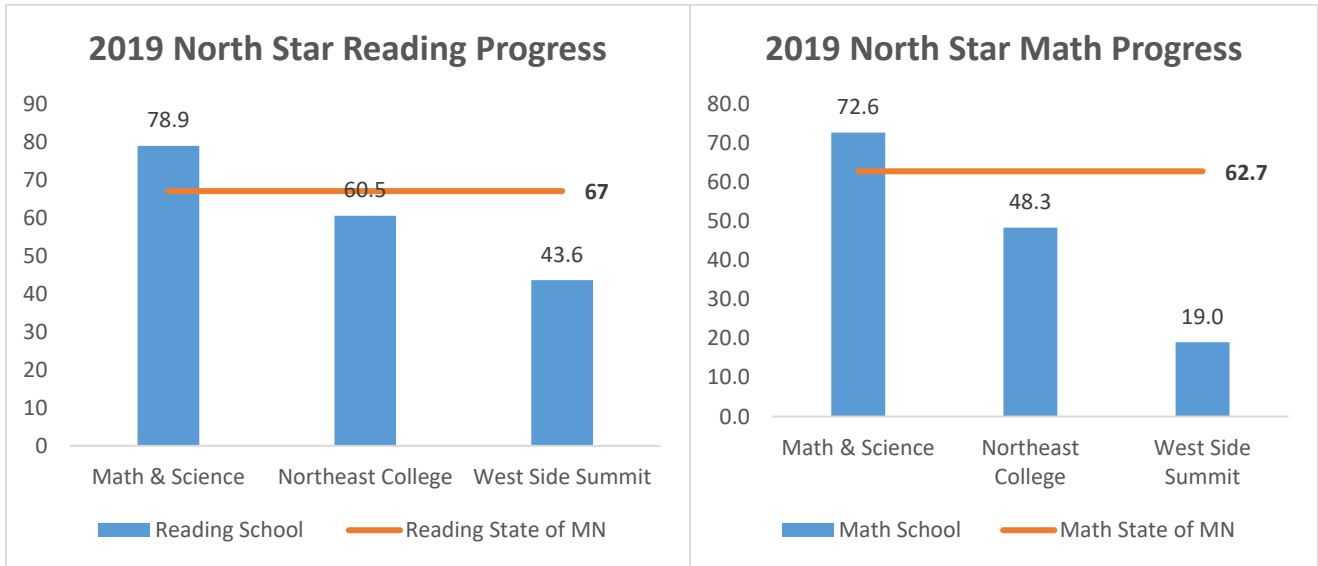
All schools surpassed the state’s attendance average.

### Academic Achievement



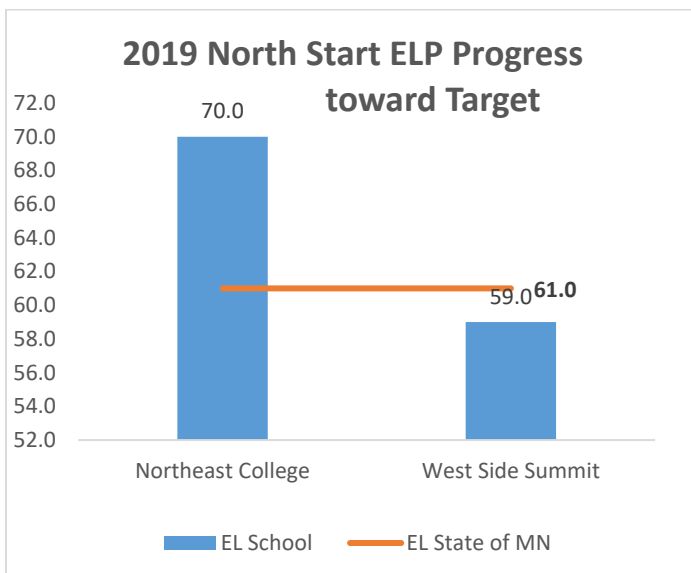


**Academic Progress**

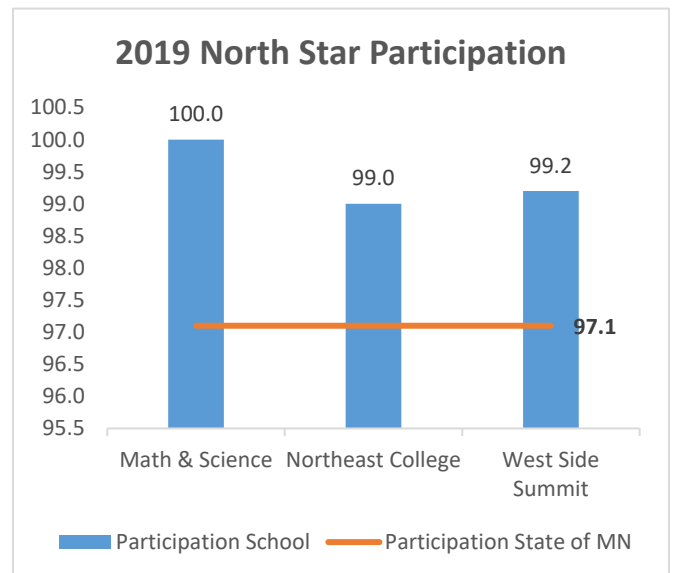


Inner-city schools struggled to meet or exceed the state in reading and math progress and proficiency.

**Progress Toward English Language Proficiency**



**Test Participation**



School test participation exceeded state participation.

## Operational Performance

**Present outcome data regarding key operational performance indicators your organization used when evaluating your portfolio of charter schools. Provide a narrative analysis of this data, indicating strengths and areas for improvement.**

SAM's most effective means of monitoring and evaluating school operations are the review of board meeting minutes, the school's annual report, SAM's reporting portal and MDE communications. SAM's board meeting tracker provides valuable and timely information on indicators critical to school competence and success like board membership and meeting attendance, student achievement discussion, implementation of school policies, professional development training, school finances and open meeting compliance. Schools are contacted with urgency if questions or clarification are needed. All schools continue to display mission and vision fidelity.

### Governance

A monthly review of board meeting minutes suggests school boards are diverse, reasonably competent and effective in school oversight and compliant with regulation. In general, schools held board meetings on a monthly basis. SAM monitors the school's posting of board meeting minutes, school policies and mandated reports. Schools are issued a "corrective action" if the findings are unsatisfactory. SAM observed that all schools increased the utilization of board committees to enhance board efficiency. All schools participated in board trainings/professional development as required. MSA and NECP held annual board elections per school policy.

### Compliance

SAM uses its reporting portal to track and manage required reporting. The instrument identifies the required report and due date. Different colors are used to track the timeliness of submissions. The expediency of tracking and reporting allows SAM to conduct its oversight in a timely manner. The timeliness and completeness of reporting is factored into the school's evaluation.

As a standard practice, SAM completes website, financial, annual reports and WBWF audits to ensure compliance. SAM met with school administration to discuss audit findings and to identify items in need of immediate attention. The timely submission of reports remained a challenge for NECP and WSS. The schools are acknowledged for responding to the authorizer's communication of concern(s) and correcting the problem in a timely manner.

### Policies and Practices

SAM tracks and monitors the review of school policies (adoptions and revisions) through the review of board meeting minutes. MSA and NECP revised the school's admission and enrollment policy to comply with state statute. This non-compliance was discovered in SAM's review of documents for charter renewal process.

SAM continues to advocate for increased academic discussion at board meetings so board members are informed and knowledgeable about the school's academic performance. The review of board minutes suggest academic discussions are somewhat brief and not always informative. SAM continues to emphasize the importance of why governing boards need to be acutely informed about what's happening in the school academically.

West Side Summit self-elected to terminate its charter contract with SAM effective June 30, 2019. In 2017-2018 the school was given a two-year renewal because of its poor academic performance and operational

deficiencies. WSS continued to struggle and made minimal progress to increase student learning and advance the school’s improvement plan. SAM took an aggressive proactive role in helping the board recognize and accept the school’s viability. The decision to close the school was courageous and the right decision.

Operation Indicators		# of SAM schools Achieving Indicators / # SAM schools with reportable results			
		2019	2018	2017	2016
	Educational Program contained in charter implemented	3/3	3/3	3/3	3/3
	Instruction/assessment aligned to standards, emphasizes student achievement	3/3	3/3	3/3	3/3
	Complies with ALL applicable laws and reporting requirements	1/3	1/3	1/3	1/3

### Financial Performance

**Present outcome data regarding key financial performance indicators your organization used when evaluating your portfolio of charter schools. Provide a narrative analysis of this data, indicating strengths and areas for improvement.**

SAM implements several measures to monitor the fiscal management to ensure fiscal responsibility and mandated compliance. Schools must submit finance reports to SAM’s portal monthly. SAM reviews the reports and contacts the school leader or business manager if there are questions or clarification is needed. Critical elements of the review include student enrollment, revenue, expenditure, credit card itemization, cash flow, and entries that warrant some explanation. By charter agreement schools are required to maintain a 20-25% fund balance. State finance awards provide added assurance that schools are fiscally managed in a responsible manner.

All schools complied in submitting monthly finance reports to SAM. FY19, annual finance audits were completed and submitted to SAM by the due date. SAM’s review of the audit gives attention to material weaknesses, adhering to the annual budget, fund balance trends and compliance. MSA and NECP were cited “clean” audits with no material weaknesses. Whereas, WSS was cited for “late payments”. MSA’s fund balance continued to increase, exceeding the fund balance charter contract requirement of 20-25%. NECP and WSS’ fund balances decreased. NECP’s fund balance decreased for the third consecutive year from 10% to 7%. SAM issued NECP a “Letter of Concern” and required a three-year course of action because of this alarming trend and deficit spending. SAM reiterated the necessity of increasing the fund balance to ensure school viability. WSS’ fund balance also decreased from 4% to 2%. NECP and WSS struggled to stabilize and increase student enrollment. MSA and NECP were recipients of the 2019 MDE School Finance Award for its 2018 reporting.

SAM believes that the future aspirations of schools are significantly attributed to stable and increased enrollment. Thus, SAM conducts an acute monitoring of student enrollment and how appropriately school leadership responds to enrollment fluctuation. MSA’s enrollment remains strong, stable and continues to grow along with the school’s waiting list. NECP did not meet long-term enrollment projections, thus impacting the

school’s financially stability and future planning. WSS with its continuous challenges and struggles also failed to meet enrollment projections. WSS’ “ending” financial status because of school closure is pending because MDE audits are pending.

	# of SAM schools Achieving Indicators / Total # SAM Schools with Reportable Results			
	2019	2018	2017	2016
<b>Finance Indicators</b>				
Compliance w/ financial audit reporting due date	3/3	3/3	3/3	3/3
External Audit: No material weaknesses or significant deficiencies	3/3	3/3	3/3	3/3
Fund Balance Greater $\geq$ 25%	1/3	1/3	1/3	1/3
State Finance Award	2/3	2/3	2/3	2/3

## Other Performance

**Present outcome data regarding other key performance indicators your organization used when evaluating your portfolio of charter schools. Provide a narrative analysis of this data, indicating strengths and areas for improvement.**

The charter contract is foremost in the evaluation of the portfolio, but SAM considers other performance measures like strategic plan goals, MDE honors/recognition, external school quality reviews, “outside interest” who want to invest in the school to advance school quality and public ratings.

SAM requires schools to adopt continuous improvement plans to further school improvement and effectiveness as a standard practice. SAM provides an external quality school review of schools after charter renewal to offer a “different” critique of school success and areas needing improvement. The external review allows for confirmation of the authorizer observations and concerns; value added.

### Contract Goals

MSA met or exceeded charter contract goals. NECP and WSS did not meet academic charter contract goals but met non-academic goals.

### External Quality School Review

SAM contracted with Class Measures to conduct a WSS quality school review in January 2019. The report provided valuable information which help the WSS board in their school closure decision-making. External quality school reviews for MSA and NECP are scheduled for January 2020.

### Awards/Recognition

MSA received accolades from The U.S. News & World Report and NICHE (real estate school ranking ). The U.S. News & World Report (2019) ranked MSA as the #1 high school in the state and #133 nationally.

NECP was a Great MN Schools “Good to Great” grant recipient. Resources and initiatives afforded by Great MN Schools will focus on increasing student achievement, teacher instruction and school leadership.