

# Utah State Charter School Board Evaluation Report



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## Overview

In the review of the Utah State Charter School Board (SCSB) conducted by the National Charter Schools Institute and its partner, The 305 Education Group, many fundamentally positive aspects were uncovered as well as opportunities for growth. The study comprised a review of documents, the SCSB Board (Authorizer) self-assessment, an assessment conducted by SCSB staff and charter school leadership, and interviews of individuals from all three groups.

In addition, Jim Goenner and Mark Comanducci attended a meeting of the SCSB and facilitated a strategic conversation with the board and its staff on September 8, 2022. They also spent a half-day working with the SCSB's executive director and her team the following day. Taking a holistic view, the Review Team synthesized the data, observations and insights gained from working with the SCSB and its staff to identify three Potential Actions that, properly executed in tandem, could have a lasting impact on Utah's public charter schools.

### *Results from Board Self-Assessment and Staff and School Leadership Assessments*

The assessments of SCSB Board Members, SCSB Staff, and School Leadership (charter school board presidents, charter school principals, and directors of operations) provide insight into the differences in the ratings between the SCSB Board members and their staff and school leaders and thereby offer the SCSB opportunities for growth as a charter authority in Utah.

Assessment Survey Area	Average	Board Member N= 9	Staff N=9	School Leadership* N=73
1 Focus on student outcomes	3.5	4.2	2.8	3.4
2 Exceptional leadership and effective partnerships	3.8	4.2	3.7	3.3
3 Invest in exemplary governance	4.0	4.4	3.8	3.8
4 Act strategically, be accountable	3.7	4.2	3.4	3.6
5 Manage financial resources wisely	4.2	4.5	4.3	3.9
6 Ensure an effective and well-run organization	3.9	4.3	4.0	3.5
7 Center on equity in authorizing	3.7	4.0	3.5	3.7
AVERAGE	3.8	4.3	3.6	3.6

Scale is 5=Strongly Agree; 1=Strongly Disagree

\*School Leadership includes board members, principals, and directors of operations

Using a scale of 1 to 5, the average rating by Utah State Charter School Board (SCSB) members of its oversight practices is a 4.3. This indicates a strong confidence in their colleagues and staff to oversee the charter schools within their portfolio and charter new schools. Furthermore, SCSB members have a deep background in education and charter schools, and have a desire for Utah to have a vibrant school choice system available to all families. They believe that all children can learn under the right situations and that their job is to create an atmosphere where schools can flourish without over regulation. They believe that parent choice is the most important indicator of a school's success for its community. However, they also wish to focus on student academic outcomes and have a firm belief in ensuring that there is equity in their decision-making.

Using a similar assessment, staff and school leadership each gave the SCSB an overall rating of 3.6, well above “average” of 2.5 but with opportunities for improvement. Overall, the two believe in the SCSB to provide the regulatory environment for schools to flourish and desire that the SCSB provide a clear direction and guidance for regulating the sector. Both staff and school leaders desire the SCSB to provide policies that are built on common standards of excellence for all schools to follow. They appreciate the financial oversight, which is based on agreed-upon expectations and seek for this level of clarity to exist in all aspects of SCSB's oversight.

## Actions

While there are a number of strengths and suggestions written above, there are three actions that would provide immediate results in all areas as they address the root causes. They are actions that can produce lasting changes to the health and well-being of the SCSB and the charter schools they oversee.

### *Educational Philosophy*

- **SCSB Board:** Clarify and communicate the vision, principles, values and beliefs that will guide the behaviors, decision-making, and actions of the SCSB.
- **The SCSB Board:** Adopts updated *Values*, based upon the new learning from and reflection of its annual retreat.

### *Functions of a Governing Board and Staff*

- **SCSB Board and Staff:** Clarify and delineate the functions of the governing board and the staff.

### *Procedural and Substantive Due Process*

- **SCSB Staff:** Create procedural and substantive due process for identifying and addressing areas of concern as well as performing the generally-accepted primary authorizing roles, responsibilities, and actions, in a consistent and fair manner across all schools.

## Detailed Results

The review focused on seven areas of good governance for charter schools:

1. Focus on student outcomes
2. Ensure exceptional leadership and effective partnerships (with staff & school boards)
3. Invest in exemplary governance
4. Act strategically and be accountable
5. Manage financial resources wisely
6. Ensure an effective and well-run organization
7. Center on equity in authorizing

The areas are chosen as they are the key areas for charter school authorizing agencies to consider when regulating the sector. The number one area is student outcomes, as children are the reason that we all are here. It is the collective responsibility of the sector – schools, boards, and the authorizer – to ensure that students are learning. The table below focuses on each of the seven areas and brings to light areas of strength and opportunities for growth.

Assessment Survey Domain	Preliminary (draft) <i>Observation</i>
1. Focus on student outcomes	<p>The SCSB focuses on students and discusses student learning in their board meetings and when making decisions. Board members believe that they understand and agree with the academic performance measures and standards used for new schools, expansions, and renewal decisions. However, there is an opportunity to create clear expectations for schools on the student outcomes that are valued by the SCSB Board and how they are measured and used when making high-stakes decisions such as renewal and during reviews. Providing a “north star” for schools to promote students learning enables both staff and schools to center on students and creates an atmosphere of trust and understanding. This includes setting expectations for staff reports and consistency in actions taken when staff presents similar outcomes for different schools.</p> <p>Specific feedback:</p> <ul style="list-style-type: none"> <li>• Some SCSB board members and SCSB staff expressed that while the board has standards for and staff monitors for academic performance, board members focus on demand, with parent choice and annual enrollment outweighing academic outcomes and student performance. SCSB staff suggested board members demonstrate stronger accountability language in SCSB committees than what is ultimately discussed during public meetings. This causes confusion for both staff and schools.</li> <li>• School leadership believes academic outcomes are compromised due to changes in state assessment. They also suggested that schools being measured against “like” schools is problematic when populations are not truly the same.</li> <li>• All groups expressed in some way that charter agreement goals often are out-of-date or no longer meaningful.</li> </ul>
2. Exceptional leadership and effective partnerships	<p>The SCSB strives to have strong relationships with the schools and frequently has schools highlight aspects of their programs that are going well. Members of the Board do not believe the majority of the school boards welcome and initiate candid conversations with our board and wish to address this. While some schools are comfortable talking with board members, not all schools feel that they are offered this opportunity. Likewise, some schools feel heard by staff and others feel that staff are not always assuming best intentions or focusing on partnership. The SCSB has the opportunity to provide clear expectations for staff oversight in their approach to schools. There is an opportunity to include schools in developing oversight tools, so that schools support the process and understand the purpose.</p>

Assessment Survey Domain	Preliminary (draft) <i>Observation</i>
	<p>Specific feedback:</p> <ul style="list-style-type: none"> <li>• School leadership and staff mentioned inconsistent messaging and expectations. Some were unsure about changes in roles and responsibilities and oversight focus areas.</li> </ul>
3. Invest in exemplary governance	<p>The SCSB invests in schools having strong governance and conducts all of its business in accordance with all applicable laws. They hold open meetings and are adamantly supportive of public comment and input. There is an opportunity to further this commitment to create policies and practices that will be consistently used for schools asking for similar charter amendments or requests. There is an opportunity to ensure that the school governing boards, not management companies or school leaders, hold the levers of control and understand that they are accountable for the school's performance and actions.</p> <p>Specific feedback:</p> <ul style="list-style-type: none"> <li>• Some SCSB staff and school leaders perceive that the SCSB board members do not treat all schools the same. Further, they felt that they had the ability to make friends with individual board members which could result in better treatment.</li> </ul>
4. Act strategically, be accountable	<p>The SCSB board members agreed with their strategic plan goals and mission and trust their staff's reports and use them to make decisions. The Board, however, did not rate themselves highly in actively monitoring the overall performance of their schools, in addition to gaps between student subgroups in academic performance, discipline and attendance. Staff and school leaders agree that there is an opportunity to build more intentional oversight in monitoring the achievement of all students.</p>
5. Manage financial resources wisely	<p>The SCSB board members and staff manage the organization's financial resources appropriately and ensure that SCSB's schools are held fiscally responsible and accountable. All stakeholders believe that the Board uses its own finances wisely and that it incorporates proposed budgets and/or past financial trends when making decisions regarding new applications and expansion requests.</p>
6. Ensure an effective and well-run organization	<p>The SCSB board value and operate in compliance with their bylaws, upholding our legal and ethical duties. They have confidence in their staff and support the operational standards for schools. There is an opportunity to seek feedback on the agency's performance from a wider variety of stakeholders, including school leaders who may not currently have relationships with existing board members or staff to understand how the board's oversight is experienced by schools.</p> <p>Specific Feedback:</p>

Assessment Survey Domain	Preliminary (draft) <i>Observation</i>
	<ul style="list-style-type: none"> <li>Some SCSB board members and schools expressed that schools often are afraid of SCSB staff and would prefer to have a support/mentor feel. Others suggested that monitoring is the main job of an authorizer. However, all agree that monitoring should be done with clear, articulated expectations and time to address concerns.</li> </ul>
7. Center on equity in authorizing	<p>There is agreement that all SCSB board members believe that all students can achieve at the highest levels if given opportunities and support. There are a number of opportunities to increase the focus on students through the different phases of chartering. One example is the charter application and evaluations of existing schools, which is not perceived by board members, staff, or school leaders to include measures of diversity within the school (e.g., affirming school culture for historically marginalized families and students, performance gaps in achievement). There is also an opportunity to ensure that school policies and education programs do not disproportionately impact some students negatively and/or advantage others.</p>