



**State of Hawaii**  
**Charter School Review Panel**  
73-4460 Queen Ka'ahumanu Hwy. #128  
Kailua-Kona, Hawaii 96740  
Tel: 808-721-8615 Email: csrp.hi@gmail.com

**INFORMATIONAL BRIEFING**  
**January 26, 2011**  
**for**  
**Senate Education Committee**  
**(The Honorable Jill Tokuda, Chair)**  
**and**  
**House Education Committee**  
**(The Honorable Roy Takumi, Chair)**

by the

**CHARTER SCHOOL REVIEW PANEL**

**Documents in Packet**

Fact Sheet on Charter School Review Panel  
Briefing Letter to Local School Boards re State Ethics Code  
CSAO Policy on Adjustments to Charter Schools' Allocations  
Required Response from Local School Boards re Schools' Financial Audits  
Follow-Up Letter to Myron B. Thompson Local School Board  
Reauthorization Procedures  
Reauthorization Scoring Template  
CSRP Meeting Agenda for January 27, 2011



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## **FACT SHEET on the CHARTER SCHOOL REVIEW PANEL (CSRP)**

- ✓ The “modern” CSRP grew out of Act 115 (SLH 2007) and Act 144 (SLH 2010). HRS §302B-3 specifies the panel’s duties and powers.
  
- ✓ With respect to charter schools, the responsibilities of the panel include but are not limited to: (1) issuing and revoking charters, (2) approving or denying significant amendments to charter schools’ detailed implementation plans, (their charter with the State of Hawaii), (3) reauthorizing charters based on rigorous educational criteria, (4) evaluating any aspect of a charter school the panel may have concerns with and taking appropriate action, including probation and revocation, (5) reviewing schools’ annual self-evaluation reports and taking appropriate action, (6) appointing and evaluating the Executive Director of the Charter School Administrative Office (CSAO).
  
- ✓ The CSRP believes public charter schools add depth and variety to Hawaii’s public school system, allowing parents, children and communities to make choices as to what type of schooling works best for them. A strong educational program embedded in strong values is at the heart of Hawaii’s charter schools.
  
- ✓ The CSRP believes that in exchange for greater autonomy and flexibility, Hawaii’s charter schools are held responsible for and hold themselves responsible for both establishing sound educational goals leading to improvement in student achievement, as well as for using state funds wisely and effectively in pursuit of these goals.
  
- ✓ The Panel meets the second and fourth Thursdays of each month and has 6 standing committees: Accountability, Fact-Finding, Application, CSAO, Finance, and Advocacy/Legislative Liaison.
  
- ✓ Panel chair, Ruth Tschumy, is available at 946-3453 or 381-8642 (cell) to provide assistance and information with regards to charter school matters.



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To: Local School Boards  
Hawaii's Charter Schools  
From: Charter School Review Panel  
Re: Hawaii State Ethics Code

Please discuss the following at your next Local School Board meeting.

**Each Local School Board has the responsibility to ensure that the school it oversees is abiding by the Hawaii State Ethics Code.** The State Ethics Code (Chapter 84, Hawaii Revised Statutes) applies to legislators and employees of the State of Hawaii, including charter school personnel.

The State Ethics Code sets forth a minimum standard of conduct for state officials and state employees. Local School Boards are free to adopt a standard of conduct that is stricter than what is required by the State Ethics Code. Local School Boards should strongly consider adopting policies that set high ethical standards and address both conflicts/improprieties as well as the appearance of conflicts/improprieties. For example, a Local School Board's conflict of interest policy might prohibit an employee from participating in decision-making with regards to hiring a relative. Also, a LSB should strongly consider adopting a policy that prohibits LSB members who are related to the school's director from participating in decisions that affect the director's employment, such as salary decisions and performance evaluations.

A summary of this code can be downloaded at [http://hawaii.gov/ethics/pubs\\_guides/ethicsguide.pdf](http://hawaii.gov/ethics/pubs_guides/ethicsguide.pdf). However, the LSB should be aware of the complete text of the code posted at [www.hawaii.gov/ethics](http://www.hawaii.gov/ethics)

Highlights include:

Fair Treatment (§84-13) – no state employee shall use or attempt to use his or her position to secure or grant unwarranted privileges, exemptions, advantages, contracts, or treatment, for himself/herself or others. An employee is prohibited from giving preferential treatment to anyone, including any relative or friend.

Conflicts of Interest (§84-14a) – no employee shall take any official action directly affecting a business or other undertaking in which he or she has a substantial financial interest. An employee is prohibited from taking official action affecting a business in which the employee or the employee's spouse or dependent child has a financial interest. In addition, an employee is prohibited from taking official action affecting a spouse's or dependent child's employment with a state agency.

Contracts (§84-15) – a state agency shall not enter into any contract to procure or dispose of goods or services, or for construction, with an employee, or a business in which an employee has a controlling interest, involving services or property of a value in excess of \$10,000 unless the contract is awarded by competitive bidding or the agency posts a notice of its intent to award the contract and files a copy of the notice with the state ethics commission at least ten days before the contract is awarded.

If you have questions about specific matters at your school, please call Mr. Stanley Chong of the Ethics Commission at 587-0460.

## **Charter Schools Administrative Office**

### **CSAO Policy on Adjustments to Charter School Allocations**

#### **Adjustments due to a fiscal management issues -**

Pursuant to HRS 302B-12(e) the Charter School Administrative Office may recommend to the Charter School Review Panel that adjustments be made to any charter school's allocation for the following reasons:

1. Failure of a charter school to provide a May 15<sup>th</sup> enrollment projection.
2. When a charter school's year end cash position is such that it is unable to pay for all the obligations it incurred through the end of the fiscal year.
3. When a charter school has, in prior year(s), over estimated its October 15<sup>th</sup> enrollment, as of the May 15<sup>th</sup> enrollment projection, to such an extent that it received more than its annual allocation in the first allocation an adjustment to its first allocation in future years may be recommended. When this is case the CSAO may recommend to the CSRP an adjustment in the charter school's first allocation for the purpose of reducing the likelihood of a large over appropriation that then must be recovered from the charter school.

If any of the above circumstances apply to a charter school then the CSAO may recommend to the CSRP that an adjustment be made to that charter school's allocation until such time that the reason for the adjustment is corrected by the charter school. The amount of the recommended adjustment shall be sufficient to insure that adequate funds are withheld by the CSAO to cover the reason for the adjustment.

#### **Adjustments due to administrative management issues -**

In addition to the fiscal management issues, listed above, that may result in an adjustment to a charter schools allocation, the following administrative management issues may result in a recommendation by the CSAO to the CSRP that a charter school's allocation be adjusted:

1. Non-compliance with Board of Education policies made in the board's capacity as the state education agency.
2. Non-compliance with Department of Education directives made in the department's capacity as the state education agency.
3. Non-compliance with the CSAO's administrative procedures including the requirement to submit budget and financial reports to the CSAO pursuant to HRS 302B-8(e).

If any of the above circumstances apply to a charter school then the CSAO may recommend to the CSRP that an adjustment be made to that charter school's remaining allocations for the year until such time that the reason for the adjustment is corrected by the charter school.

Adjustments to a charter schools allocation shall be released to the charter school after the school corrects the conditions that led to the adjustment. Upon correction of the condition the CSAO shall recommend to the CSRP the release of funds held per the adjustment to the charter school. Upon the concurrence of the CSRP that the adjusted funds be released the CSAO shall process the payment of the adjusted funds to the charter school.



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**IMPORTANT – RESPONSE REQUIRED NO LATER THAN JAN. 28, 2011**

Date: January 21, 2011  
To: Chair, Local School Board  
From: Charter School Review Panel (CSRP)  
Re: Required School Audits

In June, 2010, the Panel passed a motion requiring all charter schools to undergo a independent, financial audit for FY 09-10 to be completed by January, 2011. Each school's Local School Board must take the following action:

In an email to the CSRP at [csrp.hi@gmail.com](mailto:csrp.hi@gmail.com) no later than Jan. 28, 2011, the Local School Board must state:

1. LSB has discussed and reviewed the audit, and this discussion is (or will be) reflected in its board minutes.
2. If the auditor made findings/recommendations, the LSB has discussed them and has put in place internal controls/taken other steps to remedy the matter(s).
3. Verify that your school has ended FY 09-10 in a positive net assets position (i.e. "in the black")
4. A copy of your school's audit, postmarked by January 28, 2011, must be sent/mailed to [bob@hcsao.org](mailto:bob@hcsao.org) or Bob Roberts, CSAO Office, 1111 Bishop St., Suite 516, Honolulu, HI. 96813

**Mahalo!**

The Panel appreciates all your hard work on behalf of your school.



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Date: January 14, 2011

To: Malia Chow, Chair  
Local School Board  
Myron B. Thompson Academy  
From: Ruth Tschumy, Chair  
Charter School Review Panel  
Re: Policies/Procedures Re Hiring/Supervision of employees and Hawaii State Ethics Code

Aloha Ms. Chow,

We understand you were unable to attend yesterday's panel meeting, and thank you for asking Principal Diana Oshiro to attend.

As chair of the panel, I do not believe the letter you submitted (dated January 10, 2011) addresses the salient issues brought to light by a Honolulu Star Advertiser article. Accordingly, please come to the panel's January 27, 2011 meeting and provide the panel with documentation on the following

- (1) the school's written hiring and supervising policies and procedures  
These should include how jobs are advertised to ensure all qualified applicants have an opportunity to apply; establishment and advertisement of qualifications needed for the job; "fair treatment" requirements and nepotism prohibitions
- (2) further explanation of "arm's length" supervising of personnel related to the school's head
- (3) policies relating to relatives of the school's head, if any, who serve on the LSB and their participation in LSB decision-making

In addition, the panel will ask for your thoughts on whether your children are well served by an administrator holding down two full-time jobs and a nephew employee. Please explain the hiring procedures for these two employees.

Thank you.



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**Reauthorization Procedure  
For Charter Schools**

***HRS 302B-14 (6)(b) Accountability; probationary status; revocation of charter. The panel shall conduct a multi-year evaluation of each charter school on its fourth anniversary year and every five years thereafter. The panel may from time to time establish a schedule to stagger the multi-year evaluations.***

***HRS 302B-3 (8) – Charter school review panel; establishment; powers and duties. Evaluate each school charter, for the purpose of determining reauthorization, no later than four years following the initial issue of a charter and every six years thereafter.***

The guidelines for reauthorization of charter schools requires the following:

- The charter school will be notified no later than February 1<sup>st</sup> that it will be required to submit a Reauthorization Report on or before October 15<sup>th</sup> of the same year in lieu of an Annual Self Evaluation Report.
- The charter school shall utilize the Reauthorization Template provided by the Charter School Review Panel.
- The charter school shall submit its Reauthorization Report on or before October 15<sup>th</sup> of the same year. Please submit one hard copy and one electronic version via email to the Charter School Review Panel *include address and email*
- Schools will receive an acknowledgement of receipt of the completed CSRP Reauthorization Template from the CSRP Executive Assistant.
- Failure to submit a completed Reauthorization Report template by October 15<sup>th</sup> or to request a two-week extension will result in further action by the Panel up to and including non-reauthorization.
- Each charter school will be assigned a Charter School Reauthorization Visitation Team composed of at least two or more Charter School Review Panel members.



- **PROCEDURE**

**Submission of a Reauthorization Report**

The charter school submits a Reauthorization Report, utilizing the Reauthorization Template, for the renewal of its charter signed by the chair of the LSB and school director to the Charter School Review Panel by October 15th.

The Charter School Reauthorization Visitation Team encourages the Local School Board to invite written comments from stakeholders of the school including, but not limited to, parents, students, community members, local school board, and the CSAO. Written comments should be part of the Reauthorization Report as an appendix.

If your school is in restructuring in any phase under NCLB, please include the most recent copy of your Restructuring Action Plan in an appendix of your Reauthorization Report.

**Reauthorization Review**

The Charter School Reauthorization Visitation Team reviews the Reauthorization Report and the existing data. The Team also prepares a summary of issues to be raised and questions to be addressed during the Reauthorization Visit. The summary shall be sent to the school on or before January 15<sup>th</sup>.

Should concerns be raised by the Reauthorization Visitation Team during the reading of the Reauthorization Report, the charter school may be asked to supply additional information or answer specific questions during the Reauthorization Visit. These concerns shall be included in the summary provided by the Reauthorization Visitation Team.

**Reauthorization Visit**

The Charter School Review Team conducts a site visit during the month of February on dates mutually agreed upon by the school and the Team. During the site visit, the Team will conduct interviews parents, students, teachers, administrators and board members and reviews documentary evidence including information relating to the foundation of the school, educational viability, operational viability and financial viability. During the site visit, the Review Team may request additional documentation and other evidence.

**Reauthorization Recommendation**

Based upon the totality of information, including the Reauthorization Report, the Reauthorization Visit, and other pertinent information, the Reauthorization Visitation Team produces a draft report of its findings and a recommendation regarding reauthorization to the school by March 15<sup>th</sup>. The Reauthorization Visitation Team solicits comments from the charter school concerning the accuracy of the reauthorization findings and transmits a draft report to the Panel for information.

If the Reauthorization Visitation Team makes a recommendation of non-reauthorization, the charter school may request a meeting with the Panel no later than April 1st, to present reasons for reconsideration of the recommendation.

**Charter School Review Panel Action**

The Charter School Review Panel will act on the final recommendation of the Reauthorization Visitation Team at an April Panel meeting. The charter school will be notified of the action. The Charter School Administrative Office will inform the public of the final action via the CSAO website.

Schools denied reauthorization will be provided a period of time, that best serves the students, during which the school will bring its corporate affairs to a close.

Adopted by the CSRP (December, 2010)



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**Reauthorization  
Observation/Scoring Template  
For Reauthorization Visitation Team**

**December 2010  
Final**

<b>I. Foundation of the Charter .....</b>	<b>2</b>
<b>A. Founding Group.....</b>	<b>2</b>
<b>B. Mission Statement.....</b>	<b>2</b>
<b>C. Vision Statement.....</b>	<b>2</b>
<b>D. Statement of Need .....</b>	<b>2</b>
<b>II. Educational Viability.....</b>	<b>2</b>
<b>A. Student Profile .....</b>	<b>2</b>
<b>B. Instructional Goals, Philosophy, and Program.....</b>	<b>2</b>
<b>C. Student Performance .....</b>	<b>2</b>
<b>D. Barriers.....</b>	<b>2</b>
<b>E. Innovations.....</b>	<b>2</b>
<b>III. Organizational/Administrative Viability.....</b>	<b>2</b>
<b>A. Local School Board (LSB) .....</b>	<b>2</b>
<b>B. Staff.....</b>	<b>2</b>
<b>C. Administrative and Governance Benchmarks .....</b>	<b>2</b>
<b>D. Health and Safety.....</b>	<b>2</b>
<b>E. Facilities .....</b>	<b>2</b>
<b>IV. Financial Viability .....</b>	<b>2</b>

# I. Foundation of the Charter

The charter school provided members of the Reauthorization Visitation Team the following:

Document	Yes	No
Mission and Vision		
Samples of Newsletters, Web Pages and Public Announcements		
Awards and Public Recognition		
Other as requested		
Comments:		

Reauthorization Visitation Team evaluation of evidence related to the Foundation of the Charter.

Foundation Criteria	4 High	3	2	1 Low	0
The Mission and Vision clearly define the purpose and values of the school					
The charter school informs the public about its Mission, Vision and the students it serves					
The Mission, Vision and school programs are aligned and coherent and reflected throughout the school					
The Mission and Vision are consistent with high academic standards and student success					
The Mission and Vision are meaningful and free of jargon					
There is evidence that the leadership of the charter school has reviewed the Mission and Vision for their appropriateness since the opening of the school					
The compelling reasons to establish the charter school are being met through the current practices of the charter school					
The charter school evaluates the positive impacts it has on the community as described in the DIP					

Foundation Criteria	4 High	3	2	1 Low	0
Current students in the charter school match those described in the DIP or there is evidence the DIP has been amended to address student needs					
The charter school has changed, enhanced or expanded the educational options described in the DIP to better meet student and community needs					
Total Score					
Observations					

## II. Educational Viability

The charter school provided members of the Reauthorization Visitation Team the following:

Documents	Yes	No
Curriculum		
Assessments		
GLO's or equivalent		
Evidence of AYP status		
School calendar		
Typical weekly schedule for teachers		
Typical weekly schedule for students		
List of special education services provided		
Policy or procedure for promotion		
Policy or procedure for graduation, including requirements		
Restructuring plan (if applicable)		
Other as requested		
Comments:		

Reauthorization Visitation Team evaluation of evidence of Educational Viability.

Educational Philosophy Criteria	4	3	2	1	0
	High			Low	
Instructional methods support the charter school's educational philosophy					
Clear integration of the educational philosophy into the program					
The educational philosophy serves the diverse needs of individual students					
The educational philosophy aligns with the school's mission					
There are effective, research-based educational practices, teaching methods, and high standards for student learning					
The educational philosophy improves student performance					
Curriculum Criteria	4	3	2	1	0
	High			Low	
Yearly reviews of the curriculum to evaluate its efficacy take place					
A review procedure for adoption of new curriculum is in place					

The curriculum is research-based, engaging and consistent with the mission of the charter school					
Curriculum components are defined that facilitate ongoing improvement and development of the curriculum					
The curriculum is aligned with the HCPS III and/or Core Standards.					
Curriculum is accessible and appropriate for all students at all levels, including ELL, SPED and students who enter below grade level					
Curriculum includes non academic goals that are consistent with the schools mission, program and educational philosophy					
<b>School Characteristic Criteria</b>	<b>4</b> High	<b>3</b>	<b>2</b>	<b>1</b> Low	<b>0</b>
The school's culture and norms are consistent with the mission and educational philosophy					
The school calendar, teacher schedule and student schedule are thoughtful and academically rich					
<b>Special Student Populations and Student Services Criteria</b>	<b>4</b> High	<b>3</b>	<b>2</b>	<b>1</b> Low	<b>0</b>
Student services effectively identify, assess and serve special student populations					
Staff is knowledgeable of program requirements and effective means of implementation					
Appropriate staffing levels and program structure that supports delivery of high quality services for all students					
Procedures in place that ensure the programs are effectively servicing the needs of the targeted population					
Procedures for student health care					
<b>Performance, Promotion and Graduation Standards Criteria</b>	<b>4</b> High	<b>3</b>	<b>2</b>	<b>1</b> Low	<b>0</b>
Performance, promotion and graduation standards are specific, measurable and ambitious, yet attainable					
Performance standards for student assessment are clear and easy to understand for all stakeholders (teachers, administrators, parents and students)					



Performance, promotion and graduation standards are aligned with the school's mission, educational program, assessment system and HCPS III and/or Core Standards.					
Clear criteria for student promotion from one level to the next					
Clear criteria for graduation requirements					
Clear indication of the kind of diploma graduates are offered					
<b>Assessment System Criteria</b>	<b>4 High</b>	<b>3</b>	<b>2</b>	<b>1 Low</b>	<b>0</b>
There is a clear process for the collection, use and reporting of data					
Descriptions and/or examples of assessments are consistent with the school's mission and educational philosophy					
Descriptions and/or examples of assessments are research-based and include high standards for students					
Adjustments to the educational program are executed as necessary and include staff development					
There are multiple measures of student outcomes that are reported to a variety of stakeholders					
Demonstrates a working knowledge of assessment that recognizes the need for a thorough, clear, measurable, externally credible, and conceptually sound design for measuring and reporting the performance and progress of the school as a whole and the academic and social development of each student to all relevant stakeholders					
<b>Total Score</b>					
<b>Observations:</b>					

### III. Organizational/Administrative Viability

Reauthorization Visitation Team Members had access to the following:

Document	Yes	No
LSB handbook		
LSB Meeting minutes		
School Organizational Chart		
Detailed HQT List		
Health and Safety Plan		
Fire and Building Inspection Reports		
Other as requested		
Comments:		

Reauthorization Visitation Team evaluation of evidence of Organizational/Administrative Viability:

Governance Criteria	4 High	3	2	1 Low	0
LSB policies are consistent with the school's mission and program					
Operation of the LSB is consistent with the school's mission and programs					
There is an appropriate relationship between the LSB and administration regarding the governance and management of the school					
There are clear and workable reporting structures to and from the LSB and all stakeholders					
The LSB's operation, policies and procedures are consistent with public accountability and the charter school law					
School governance clearly delineates the roles and responsibilities of the Board, school director and the school staff					
The school's policies that define conflict of interest are clear; there evidence that all LSB members, school staff and the school community are aware of them and use them when appropriate					

<b>Governance Criteria</b>	<b>4</b> High	<b>3</b>	<b>2</b>	<b>1</b> Low	<b>0</b>
The school's student discipline policy is appropriately and clearly communicated to all stakeholders; there is evidence that the policy has been used to guide decision-making					
There viable processes for policy making and ongoing Board development					
The process for recruiting and selecting additional board members is clear and transparent: there evidence that these processes have resulted in a balanced, well-rounded functional LSB					
The LSB sets benchmarks for performance and evaluates its effectiveness at least yearly.					
<b>Total Score</b>					
<b>Observations:</b>					

**Additional Evaluation Criteria – for schools that have contracted with an EMO**

<b>Additional Criteria</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>
There are compelling reasons why the EMO has been selected					
There is alignment between the EMO's history and educational philosophy and the charter school's mission, vision, and educational philosophy					
There is a clear delineation between the roles and responsibilities of the school's LSB and the EMO					
There are clear, defined, and appropriate structures for the LSB to provide oversight to the EMO					

Additional Evaluation Criteria – for schools that have essential partnerships with a college, university, museum, educational institution or another not-for-profit entity.

Criteria	4	3	2	1	0
The partnership relationship enhances, complements, and/or supports the mission and educational philosophy of the school					

Staff & Student Criteria	4	3	2	1	0
There is evidence of a significant demand among parents for the charter school					
The number of teachers that are HQT is 100% or there is a plan in place to continue to raise the percentage to provide high quality education for the school's students					
The school's enrollment processes are open, fair, and in accordance with the charter school statute and regulations.					
There is a clear reporting structure for making key school-level decisions on student achievement, fiscal planning and operations					
The roles and responsibilities for the charter school's leader and other administrative staff are clear and appropriate.					
Staff have access to and take advantage of high quality professional development opportunities					
Staffing plan, hiring criteria, and evaluation procedures are clear and aligned with the school's mission					
Staff and administrative turnover does not effect the school's viability					
The facility is sufficient to serve eligible students					
The facility conforms to all County, State and Federal regulations					
The school has implemented an appropriate health and safety plan					

Staff & Student Criteria	4	3	2	1	0
Total Score					
Observations:					

#### IV. Financial Viability

Reauthorization Visitation Team Members had access to the following:

Documents	Yes	No
Current annual budget		
Description of the budgeting process		
Most recent monthly financial statement		
Most recent audit and management letter		
Most recent long-range financial plan		
Salary schedules		
Enrollment projections		
Development plans; e.g., capital fundraising, if applicable		
Partnership agreements/contracts between nonprofit or for-profits entities and the school		
Other as requested		
Comments:		

Reauthorization Visitation Team evaluation of evidence of Financial Viability:

Financial Viability Criteria	4 High	3	2	1 Low	0
A fiscal management system that establishes channels of communication; is appropriate, efficient, and follows generally accepted accounting principles (GAAP); safeguards assets					
A budget that reflects accurate revenue and expenditure estimates					

<b>Financial Viability Criteria</b>	<b>4 High</b>	<b>3</b>	<b>2</b>	<b>1 Low</b>	<b>0</b>
The LSB and the school leader demonstrate a clear understanding of the financial demands of running a school					
A viable long-range financial plan that is regularly reviewed and linked to the school's purpose and expected school wide learning results, and also addresses the school's capital needs, such as buildings, equipment, etc.					
Well-defined accounting and external audit policies and procedures are in place and meet state requirements					
All stakeholders are involved in the budgeting and financial planning process					
<b>Total Score</b>					
<b>Observations:</b>					

STATE OF HAWAII  
CHARTER SCHOOL REVIEW PANEL  
GENERAL MEETING  
THURSDAY JANUARY 27, 2011

9:30 AM

Queen Liliuokalani Building  
1390 Miller St., Honolulu Oahu 96813  
Fourth floor, room 404

Hawai'i Department of Education Moloka'i Complex  
65 Maka'ena Place, Kaunakakai Moloka'i 96748  
Room 102

**Agenda**

- I. CALL TO ORDER
- II. APPROVAL OF MINUTES
  - A. JANUARY 13, 2010
- III. ANNOUNCEMENTS
- IV. PUBLIC INPUT
- V. DISCUSSION/ACTION ON COMMITTEE REPORTS
  - A. APPLICATION COMMITTEE
  - B. ADVOCACY AND LEGISLATIVE LIAISON COMMITTEE
    1. 2011 LEGISLATIVE SESSION
  - C. CSAO COMMITTEE
  - D. FACT FINDING COMMITTEE
  - E. FINANCE COMMITTEE
    1. CSAO'S ADJUSTMENT REQUEST FOR THE CHARTER SCHOOL EXECUTIVE BUDGET
  - F. ACCOUNTABILITY COMMITTEE
- VI. DISCUSSION/ACTION ON INTERVIEWS WITH CHARTER APPLICANT GROUPS
  - A. LAUPAHOEHOE PUBLIC CHARTER SCHOOL 10AM – 10:45AM
  - B. LIAHONA YOUTH EMPOWERMENT CHARTER SCHOOL - 11AM – 11:45AM
- VII. \*\*\*EXECUTIVE SESSION\*\*\* TO CONSIDER PERSONNEL MATTERS
- VIII. DISCUSSION/ACTION ON SCHOOL REQUESTS FOR EXTENSIONS REGARDING SY2009-10 FINANCIAL AUDITS
  - A. WAI'ALAE PCS
  - B. KA UMEKE KA'EO
  - C. KE KULA O SAMUEL M KAMAKAU LABORATORY
  - D. INNOVATIONS
- IX. DISCUSSION/ACTION ON MYRON B THOMPSON ACADEMY'S PRESENTATION WITH REGARDS TO HIRING POLICIES AND PROCEDURES

- X. DISCUSSION/ACTION ON WATERS OF LIFE PCS
  - A. 2011 TERMS OF PROBATION
  - B. CSAO CFO'S ANALYSIS OF SCHOOL'S FINANCIALS
- XI. DISCUSSION/ACTION ON UPDATE FROM HAKIPU'U LEARNING CENTER
- XII. DISCUSSION ON CHARTER SCHOOL ADMINISTRATIVE OFFICE (CSAO) EXECUTIVE DIRECTOR'S REPORT
- XIII. DISCUSSION ON PRESENTATION BY HAWAII CHARTER SCHOOLS NETWORK (HCSN) ON CHARTER SCHOOL ISSUES
- XIV. DISCUSSION ON MEMBER CONCERNS/FUTURE AGENDA ITEMS
- XV. ADJOURNMENT



## Hawaii's Charter Schools

Information & Statistics

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### What are Charter Schools?

- Charter schools are best understood as educational models for choice and reform.
- May function as "lab" schools where innovative teaching and curricula are developed and tested.
- All are accountable for student results via the Hawaii State Assessment.
- Many are also designed to deliver programs tailored to educational excellence in the context of needs within communities they serve.
- For a summary of charter school research findings- overwhelmingly supporting the viability and success of charters- see [What the Research Reveals About Charter Schools](#).

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### CHARTER SCHOOL DEFINITION

- Charter schools are public schools, funded on a "per pupil" allocation separate from the Department of Education.
- They are state-legislated, legally independent, innovative, outcome-based public schools operating under a contract (charter) with the [Charter School Review Panel](#).

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### How are charter schools different?

Charter schools operate on three basic principles:

- **Choice:** Charter schools give families the opportunity to choose the school most suitable for their children's educational well being. Teachers choose to create and work at schools where they directly shape the best working and learning environment for their students and themselves.
- **Accountability:** Charter schools are judged on how well they meet the student achievement goals established by their charter contract. However, because charter schools are schools of choice, the highest measure of accountability is student enrollment...if students and their families are unhappy, they will leave.
- **Freedom:** While charter schools must adhere to the same major laws and regulations as all other public schools, they are freed from the red tape that often diverts a school's energy and resources. Hawaii's charters are held accountable to No Child Left Behind (NCLB) and the State's Content and Performance Standards.

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### Why are Charter Schools so popular?

- **Educational Quality:** The primary reason is to make sure every child has access to a quality education.
- **Focus on the kids:** A charter school is established around the needs of children, with programs designed to help children succeed.
- **Safer, stronger communities:** Charter schools engage their communities to help provide services and resources to the school and its families. They also typically have a large support base from families, friends, the local community and businesses. Charter schools are beginning to show that they have a proven effect on the strength and safety of a community.

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### Charter Schools Nationally

- Charter schools are one of the fastest growing and most successful educational reforms in the country.
- The first charter school opened in St. Paul, Minnesota, in 1992 and now there are close to 5,000 charter schools serving over 1.6 million children across 40 states and the District of Columbia.

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**NEW FEDERAL INITIATIVES SUPPORT HIGH QUALITY CHARTER SCHOOLS**

- President Barack Obama and Secretary of Education Arne Duncan support funding for the Federal Charter School Program to support the creation of more successful, high quality charter schools.
- The Obama Administration will provide this expanded charter school funding to states that improve accountability for charter schools, allow for interventions in struggling charter schools and have a clear process for closing down chronically underperforming charter schools.
- The Obama Team are also supporting states that help the most successful charter schools to expand to serve more students.
- Hawai'i is one of the few states nationally that received Race To The Top dollars, with the change in Hawai'i's charter school statute playing a role in this taking place.

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**Organization / Governance**

- Charter schools in Hawaii are authorized by a separate entity called the Hawaii Charter School Review Panel (CSRP)...and governed by their Local School Boards (LSBs).
- The CSRP authorizes new charter schools, reauthorizes existing charters, approves amendments to existing charter schools Detailed Implementation Plans (DIPs), and may also place a charter on Probation or revoke their charter.
- State law allows three new start-up charter schools for each existing start-up charter school that receives at least a three-year accreditation. The total number of conversion charter schools authorized by the CSRP shall not exceed 25.
- Charter schools are state public schools, but they do not come directly under the Department of Education (DOE).
- The CSRP has oversight of Hawaii's charter schools.

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**Charter School Administrative Office (CSAO)**

The Hawai'i Charter School Administrative Office (CSAO), is the state office that supports Hawaii's charters :

1. As an advocacy office,
2. Offering technical assistance,
3. Acting as a state liaison,
4. Assisting with compliance, and
5. Responsible for allocations of state and federal funds.

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## **Hawaii's Charter Schools**

- **NUMBER OF CHARTER SCHOOLS IN HAWAII:** 31
- **ISLAND LOCATIONS:**  
Oahu, Maui, Kauai, Hawaii  
and Molokai
- **NUMBER OF STUDENTS  
IN 2010-11:** 9,026  
(K-12)
- **NUMBER OF CHARTER  
SCHOOL EMPLOYEES:**  
1000+

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## **Geographic Area**

- Kauai (4)
- Oahu (12)
- Maui (1)
- Molokai (1)
- Hawaii (13)
- Only five charter schools are located in urban Honolulu; the majority serve rural Oahu and Neighbor Island communities.

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## **Enrollment Summary**

- Enrollment has steadily increased every year with 3,066 students in 2001-02 to 8,098 in 2009-10... Official enrollment for 2010-11 is 9,026.
- Since 2001-02, the number of charter schools increased from 22 to 31.
- From 2003 to 2010, enrollment in Hawaii's charter schools have grown by approx. 200 percent even though only four new schools were established.
- The average enrollment per school has increased nearly every year from 139.36 in 2001-02 to 291.16 in 2010-11

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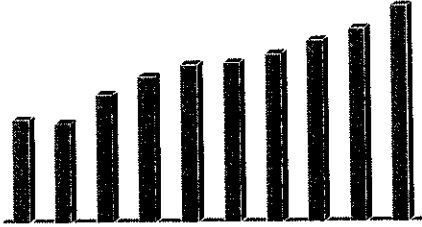
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### Average Enrollment per School



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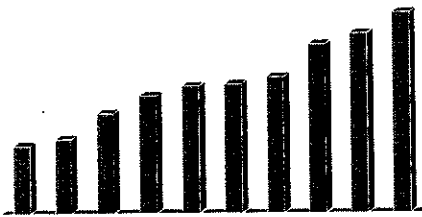
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### Total Charter School Enrollment Growth



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### Waitlist Summary

- The estimated total of students on waitlists at Hawaii's charter schools for school year 2010-11 was over 3,000
- About 1,000 children were on the waitlist at Education Laboratory at the beginning of the year

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**Where Are Charter Students Coming From?**

- Of the schools that reported, 44% of new students were from DOE, 28% were incoming kindergarteners, 8% from home schooling, 7% from private schools, 7% from other charters and 6% new to the State



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**Hawaii Charter Schools' Focus Areas**

- A little more than one half, 17, are Hawaiian culture-based
- Others have strong art and science components
- Two are virtual-hybrid schools.
- The majority bring environmental awareness and stewardship of the earth into their curricula.

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**Hawaiian Focused Charter Schools**

- In 2008-09, about 88 percent of the 3,500 students that these schools served, have Hawaiian ancestry.
- These schools also serve a high proportion of socio-economically and educationally disadvantaged children.
- The Hawaiian focused charter schools are more likely than their counterparts in other public schools to have students who live in "at risk" conditions.

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### Ethnicity

- Ethnic breakdown greatly varies depending on the school and its location
- About 58% of students at reporting charter schools are considered Hawaiian or part-Hawaiian
- Some Hawaiian focused charter schools have reported having 100% of their students being of Hawaiian ancestry

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### SPED Summary

- The percentage of SPED students ranges greatly depending on the school
- In 2009-10, the high included Halau Ku Mana (28.6%), Ke Ana La'ahana (22.9%), and Hakipu'u (21%)
- The low end included Ke Kula Ni'ihau o Kekaha (0%), Myron B. Thompson Academy (0.6%), and Ke Kula 'o Samuel M. Kamakau (1.7%)

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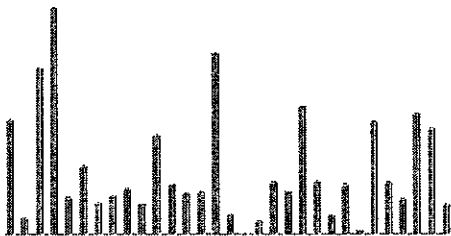
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Percentage of SPED 2009-10  
by School



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**Homelessness in Charter Schools**

- As of the end of 2010, about 1.6% of charter school students were identified as homeless, slightly higher than the DOE's 1% of homeless students.
- Kamaile Academy has the highest rate of homeless students at any public school at almost 12.3%.

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**Average Daily Attendance Rate Summary**

- The vast majority of the schools reported that for 2008-09 their average daily attendance rates were higher than 90%, with over a third reporting in the highest range of attendance at 95-98%

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**Student Retention Rate**

- According to the 2009-10 AYP, 10 of 15 charter schools had 0% retention rates (percentage of students that are held back a grade)
- Three others had retention rates of 1% while the other two had 3% and 5%

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### **Graduation Summary**

- Graduation rates, according to the 2009-10 AYP results, range from 100% (5 schools) to 67% (1 school)
- However, the way AYP is reported negatively impacts graduation results of charter schools because of their smaller populations
- AYP requires schools to track students when transferring out of schools otherwise the student is regarded as a drop out
- It is not always possible to track students effectively

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### **AYP Status**

- 12 out of 31 charter schools met AYP in 2009-10
- A higher percentage of charter schools met AYP in 2009-10 than in 2008-09
- 12 charters are "In Good Standing"

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### **Reading Proficiency**

- According to the 2009-10 AYP, the highest charter school score was 92% proficient and the lowest 20%
- 15 out of 30 charter schools were at or above the state average
- From SY 2006-07 to SY 2009-10, the average increase in reading proficiency AYP scores for charter schools has been about 11% compared to the State's 7%

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## Math Proficiency

- According to the 2009-10 AYP, the highest charter school score was 67% proficient and the lowest 12%
- 10 out of 30 charter schools were at or above the state average
- From SY 2006-07 to SY 2009-10, the average increase in math proficiency AYP scores for charter schools has been about 9% compared to the State's 10%

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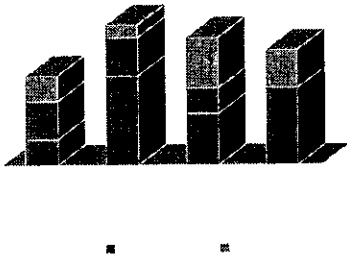
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## Average AYP Score Increase



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## ACCREDITATION

- 8 charters are accredited by the Western Association of Schools & Colleges (WASC)
  - Hawaii Academy of Arts and Science (7 - 12; start up)
  - Hawaii Technology Academy (K - 11; start up)
  - Kanu 'o ka 'Aina New Century Public Charter School (K - 12; start up)
  - Kihai Charter School (K - 12; start up)
  - Lanikai Elementary School (PK - 6; conversion)
  - Myron B. Thompson Academy (K - 12; start up)
  - Waijale Elementary Public Charter School (K - 5; conversion)
  - West Hawaii Explorations Academy (9 - 12; start up)
- 1 School is a candidate for accreditation, 5 have applied for candidacy, and others are preparing for candidacy

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## How are Charter Schools Funded?

- The budget for charter schools is prepared by the CSAO and is approved by the Charter School Review Panel, Budget & Finance/Governor's Office and the State Legislature.
- Charter schools are public schools.
- The State has an obligation to fund all students in public schools.
- Hawaii's charter schools are funded according to enrollment and receive funding from the State according to the number of students attending.
- Hawaii's charter schools are funded by the Hawaii State Legislature.
- Hawaii's Charter School Administrative Office (CSAO) distributes this allocation, by law, to each school by a per pupil amount. Although federal funds are also allocated, the formula for equitable distribution between DOE and charter schools is unclear.
- Facilities were funded in 2010-11 by carving out funding that otherwise would have been appropriated as operating funding. The Charter Schools Funding Task Force recommends that a "needs based" facilities funding formula be developed for charter schools.
- *It is the charter schools' position that funding for charter schools should be equitable to that received by DOE schools and that a funding formula be developed to that end.*

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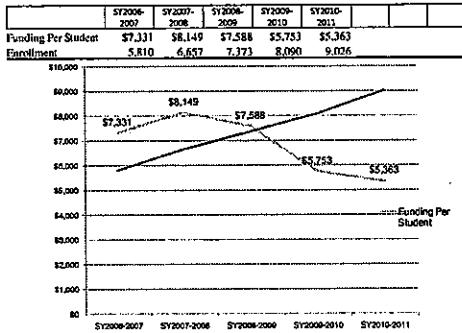
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**Enrollment Increases while Funding Decreases**




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## Charter Schools' Facilities Needs

- When charter schools were first approved, facilities and their maintenance was an issue, but was not included in the overall funding for charter schools.
- Today, it is increasingly becoming clear that facilities costs are one of the highest costs for charter schools, including lease rents, repair and maintenance.
- Some early thinking was that charter schools, governed by local school boards, could raise the funds from private and other sources.
- Today, it is clear that many charter schools are located in rural and/or lower socioeconomic areas, making fundraising an unreliable alternative. In addition, fundraising requires an entirely different skill set and a considerable amount of time. Charter schools would, in effect, have to stretch or increase their budgets for both additional resources and time.
- Facility support language was finally signed into law in June 2009 after many years of lobbying efforts by charter advocates.
- *It is the charter schools' position that funding for facilities and their improvement and maintenance should be equitable to that received by DOE schools to allow for equity of ALL PUBLIC SCHOOL STUDENTS.*

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## Charter School Furloughs School Year 2009-10

- Like the University of Hawaii and the Department of Education, the charter schools' budget was drastically cut.
- As a result, each school made decisions at a local level to best address the shortfall and minimize the impact to students.
  
- 17 schools had no furloughs
- 9 schools took between 3-16 days
- Only 5 schools took the same furlough days as the Department of Education

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## Task Force Recommendations

- SCR 108 created the Charter Schools Funding Task Force
  - The Task Force recently issued their final report
  - The report included two recommendations
    - Revise the per pupil operating formula to include in the per pupil calculation the appropriation made in the DAGS budget for Neighbor Island DOE schools R&M
      - Cost = \$258 K in 2011-12
    - Establish a "needs based" facilities funding formula in statute for charter schools
      - The value of all of the factors that go into a needs based formula have not been determined as of the date of this report, nonetheless the estimated cost for this is \$6 - \$9 million in FY2011-12

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## BOTTOM LINE

- Charter schools are serving the children of Hawaii by offering an alternative to traditional education that is demonstrating results while offering school choice, greater community involvement, innovative curriculum, and are beneficial to students, their parents and our state.

**HAWAII'S CHARTER SCHOOLS APPRECIATE AND  
NEED YOUR SUPPORT**

*MAHALO*

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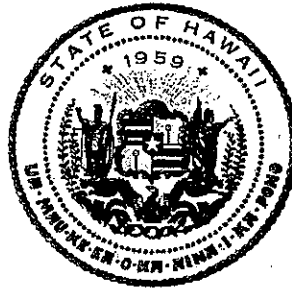
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**REPORT TO THE TWENTY-SIXTH LEGISLATURE  
STATE OF HAWAII  
2011**

**PURSUANT TO S.C.R. 108, S.D. 2**

**REQUESTING THE CONVENING OF A TASK FORCE TO ESTABLISH A  
CONSISTENT FUNDING FORMULA, PROCESS, OR BOTH, BY WHICH  
EQUITABLE FUNDING TO CHARTER SCHOOLS IS DETERMINED**





## 2010 CHARTER SCHOOL FUNDING TASK FORCE

January 3, 2011

Aloha:

The Charter School Funding Task Force, as created by Senate Concurrent Resolution 108 (2010) is pleased to submit this final report. This report contains our findings and recommendations that we would like the Administration, the Legislature and other stakeholders to consider as the discussion on finding an equitable funding solution for Hawaii's charter schools continues.

The Task Force convened in August of 2010 and concluded its meetings in December. During these five months many issues relating specifically to facilities funding arose and the task of creating a dedicated and equitable funding source proved to be much more challenging as it was apparent funding was not the only issue. Issues of need, reliability and fairness in funding also arose.

Given the fact that each charter school has different facilities needs (brick and mortar versus trailers) and lease or rent costs, using a per pupil based formula for facilities may not be the most equitable or practical way of distributing funds. One possible way to address the varying facility needs could be to move from formula based funding to one based on need. The Task Force hopes that the concept of needs based funding is seriously considered by all stakeholders as this discussion moves forward.

The Task Force is also aware that the 2010 Supplemental Budget included a proviso that directs \$1,909,049 toward charter school facilities funding and tasked the Charter School Administrative Office (CSAO) with developing a methodology to distribute these funds. The CSAO was also directed to prepare a report containing a detailed breakout of facility related expenditures for the last completed fiscal year for each charter school and the method of funding. As this report is still being completed by CSAO, the Task Force submits its proposals and asks that the Administration, the Legislature and other charter school stakeholders take a look at the task force's recommendations alongside CSAO's report.

The members of the Task Force recognize that many questions still remain unanswered and that the recommendations contained in this report by no means represent the perfect solution to creating an equitable funding source for Hawaii's charter schools. These findings and recommendations reflect a new starting point for the Administration, the Legislature, charter schools, and the community at large to discuss.

Neil Abercrombie  
Governor

Maunalei Love  
Executive Director



**Charter School Administrative Office**

1111 Bishop Street, Suite 516  
Honolulu, Hawaii 96813  
Tel: 586-3775 Fax: 586-3776

December 30, 2010

Senator Shan Tsutsui  
President of the Senate  
State Capitol, Room 409  
Honolulu HI 96813

Representative Calvin Say  
Speaker of the House of Representatives  
State Capitol, Room 431  
Honolulu HI 96813

Dear President Tsutsui, Speaker Say  
and Members of the Hawaii Legislature:

Pursuant to Senate Concurrent Resolution 108, and on behalf of the Charter Schools Funding Task Force, I am transmitting a copy of the "Charter Schools Funding Task Force Final Report".

In accordance with section 93-16, Hawaii Revised Statutes, we have also transmitted a printed copy of this report to the Legislative Reference Bureau Library.

The public may view an electronic copy of this report on our agency's website at the following link: [www.hcsao.org/pages/resources](http://www.hcsao.org/pages/resources)

Should you have any questions about this report, please don't hesitate to contact Bob Roberts at 586-3777, or via e-mail at [bob.hcsao.org](mailto:bob.hcsao.org)

Sincerely,

Vanelle Maunalei Love  
Executive Director  
Charter Schools Administrative Office

C: Legislative Reference Bureau Library

CHARTER SCHOOLS FUNDING TASK FORCE  
FINAL REPORT TO THE 2011 STATE OF HAWAII LEGISLATURE

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Remaining/Unresolved Issues..... 11

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# CHARTER SCHOOLS FUNDING TASK FORCE FINAL REPORT TO THE 2011 STATE OF HAWAII LEGISLATURE

Because of time constraints, the Task Force was unable to fully address all of the issues outlined in Senate Concurrent Resolution 108 and other issues presented to it during its investigations. These issues are identified in the Remaining/Unresolved Issues section of this report.

## Background

### *SCR 108 Creating the Task Force*

The Charter Schools Funding Task Force (CSFTF) was created as a result of Senate Concurrent Resolution 108 (SLH, 2010) requesting the convening of a task force to establish a consistent funding formula, process, or both, by which equitable funding to charter schools is determined (see Appendix 1 for a copy of SCR 108).

SCR 108 further requests that the CSFTF examine the following in making its determination:

1. Detailed information on the existing funding sources of the charter schools' per pupil allocation;
2. Detailed information on the Department of Budget and Finance's method of calculating the Department of Education's per-pupil allocation and the charter school's per-pupil allocation amounts;
3. Discrepancies and the reasons for discrepancies in calculations of per-pupil allocations for non-charter public schools and charter schools by various agencies; and
4. The portion of debt service, repair and maintenance, and capital improvement expenses that should be paid by charter schools.

### **Membership of the Task Force**

Representatives of various departments and offices of listed organizations were requested to convene as members of the Task Force. The following individuals were the members of the Charter Schools Funding Task Force:

1. Marcus Oshiro, Chairperson of the House Committee on Finance
2. Donna Mercado Kim, Chairperson of the Senate Ways and Means Committee (recused herself from the Task Force after the December 6, 2010 meeting)
3. James Brese, CFO of the DOE
4. Georgina Kawamura, Director of Finance (represented by Neal Miyahira during most of the meetings)
5. Megan McCorriston, Executive Director of Ho'oka Corporation
6. Alapaki Nahale-a, Executive Director of the Hawaii Charter Schools Network (replaced by Steve Hirakami starting with the December 13, 2010 meeting)
7. Bob Roberts, CFO of the CSAO
8. Carl Takamura, Charter School Review Panel

### **Meetings of the Task Force**

The Task Force met 9 times (August 16, September 1, September 28, October 26, November 15, November 29 and December 6, December 13 and December 20). See Appendix 2 for Agendas and Meeting minutes of these meetings.

## CHARTER SCHOOLS FUNDING TASK FORCE FINAL REPORT TO THE 2011 STATE OF HAWAII LEGISLATURE

its business. Representative Oshiro was elected the Chair of the Task Force and Senator Kim was elected Vice Chair. The Task Force also discussed future meeting dates and data/reports to be presented at the next Task Force Meeting.

During this meeting a presentation was delivered by Taffi Wise and Katie Benioni, representatives of the group that met with Senator Takamine, to the Task Force. The result of this work was a series of recommendations that were included in a report from the Senator Takamine Work Group (hereinafter referred to as the Work Group report). A complete copy of the report, titled "Understanding Public School Funding Fiscal year 2009-10" is provided as Appendix 3. The following summarizes the recommendations of this group:

1. Create a reliable system to allow charter schools access to federal competitive grant opportunities.
2. Ensure that services provided in lieu of funding are equitable.
3. Move Non-SPED funding within EDN 150 to EDN 100.
4. Establish Charters as an LEA to access federal funding.
5. Give Charters a proportionate share of facilities funding.
6. Create a mechanism for post school opening funding adjustments.
7. Educate legislators and B&F on how the funding formula functions in relation to the budget appropriation.
8. Collaborate with the DOE in advocating for adequate per pupil funding.

At the conclusion of the August 16, 2010 meeting CSFTF members requested for their next meeting:

- Status of Recommendations from the Senator Takamine Work Group report
- Discussion regarding the pros and cons of future appropriations to charter schools being made on a formula basis or using the same process as other State Departments (formula v. line-item budget request).
- Discussion regarding the Budget Proviso language (Act 180) pertaining to charter schools and impacts due to that language.

### **September 1, 2010**

At the September 1, 2010 Task Force meeting members received reports from Mr. Brese and Mr. Roberts regarding the current status of the recommendations of the Work Group report that was presented at the prior Task Force meeting (see Appendix 4). These items were discussed at length by the Task Force.

The Task Force also received information and discussed the concept of changing the appropriations process for charter schools from a formula basis to a line-item basis. Task Force members agreed that the impact on charter schools from the Budget Proviso language was adequately addressed during the discussion of the recommendations of the Work Group.

At the conclusion of this meeting the Task Force members agreed that the role of the Task Force be to "fine tune" the formula process rather than establishing a new funding mechanism or recommending that the charter schools funding process be based on a line-item request.

## CHARTER SCHOOLS FUNDING TASK FORCE FINAL REPORT TO THE 2011 STATE OF HAWAII LEGISLATURE

with debt service obligations which are currently funded from the charter schools operating funds.

Bob Roberts delivered a presentation regarding how public-private partnerships can be viewed as one element in comprehensive program of providing resources for the development of facilities for charter schools (Appendix 10). The primary conclusion of his presentation was that while private-public partnerships can help to pay for many of the up-front planning and design costs of facilities they rarely provide funding for construction costs. As a result, and per the examples provided by Kanu o ka Aina and Ke Kula Samuel Kamakau the current result of public-private partnerships in funding charter school facilities is unfunded debt service costs that are currently funded by charter schools from their operating funds.

Alapaki Nahala-e delivered a presentation regarding the political considerations regarding public-private partnerships (Appendix 11). Mr. Nahala-e stated that the purpose for charter schools is to elevate the success of all students. This is accomplished through innovation, reaching underserved populations of students and creating choice for parents and students. However, in order to achieve these goals charter schools need adequacy and equity in funding. This presentation also addressed the issue that the expectations for charter schools are different and that because charter schools have autonomy it appears that some believe they should not expect equity in funding. In fact charter schools are subject to all of the same academic, health and safety, collective bargaining and compliance issues as other public schools. With respect to the autonomy issue, charter schools do have a greater degree of autonomy than regular public schools, yet with all of the compliance issues this autonomy is not as great or expansive as is commonly thought.

At the conclusion of the October 26, 2010 meeting the Task Force members agreed to leave the agenda for the next meeting (November 15, 2010) open for discussion of the information that was provided to the Task Force during its prior meetings.

### **November 15, 2010**

During this task force meeting members focused on the details of a formula to address facilities funding for charter schools. Several issues were identified during this discussion that had not been previously addressed:

Assuming that the formula suggested by Neil Miyahira forms the basis for the recommendation how will conversion charter schools facilities needs (primarily major repair & maintenance) be addressed?

How will the facilities needs of conversion schools that have an approved amended DIP to expand the grade levels that they serve beyond those grade levels where the conversion charter school is the school of record for students in that attendance area? Currently there is only one conversion charter school in this situation (Kamaile Academy). Task Force members discussed this issue and agreed that for schools in this situation that the enrollment due to the expanded grade levels would be counted as start-up school enrollment for the purposes of the proposed facilities funding formula.

## CHARTER SCHOOLS FUNDING TASK FORCE FINAL REPORT TO THE 2011 STATE OF HAWAII LEGISLATURE

In fiscal year 2010-11, per requirements of Budget Proviso 39.1 (Act 180 SLH, 2010), up to \$1,909,049 in charter school operating funds were directed to be used to fund charter school facilities in an amount equal to \$197 per pupil with any excess funds being deposited into a special reserve account within the State Treasury. Because the actual official enrollment count was slightly under the projected enrollment count only \$1,778,122 of these funds were actually distributed to the charter schools. The remaining \$130,927 will be deposited into the special account as provided by law.

In no other years have State funds been appropriated to provide for the facilities costs incurred by the State's charter schools.

### **Findings**

The Task Force finds that changes in statute made during the 2010 legislative session helped to clarify the calculation of the per pupil funding for charter school operations. This has been a process that has taken many years. The committee further finds that the next step in this process should be the development of a formula for funding charter schools facilities needs.

The Task Force finds that some variation remains in the appropriation of funding for charter schools. Specifically the task force noted variation in federal funding, SPED and other non-general fund appropriations. These variations may not be specific to charter schools; rather they appear to disproportionately affect small and rural schools.

The Task Force finds that the Department of Education public schools routine repairs and maintenance costs are only partially reflected in the DOE's budget. Oahu regular public school R&M costs are reflected in EDN 400 since DOE has assumed repair and maintenance operations on Oahu. However, neighbor island routine R&M costs are reflected in DAGS' budget AGS 807. This appropriation has not been included in the formula calculation for charter school operations.

The Task Force finds that in the 2010 legislative session that a portion of the charter school operating funds (\$197 per enrolled student), calculated per statutory formula, was redirected, per budget proviso, to provide a funding source for charter school facilities. The effect of this on charter schools was that no additional facilities funding beyond what was calculated per statute was provided. Rather an amount that should have been provided for operating funding was instead provided as facilities funding. This had the effect of decreasing the amount of resources available for the charter school for operations below the comparable amount provided to the DOE per statutory formula.

### **Recommendations**

The Charter Schools Funding Task Force makes the following two recommendations to the Hawaii State Legislature:

- (1) Revise the language in statute such that the charter schools per pupil funding formula for operations includes within the formula base DAGS' appropriation code AGS 807


CHARTER SCHOOLS FUNDING TASK FORCE  
FINAL REPORT TO THE 2011 STATE OF HAWAII LEGISLATURE

- (6) Facilities funding support (5 times average annual cost per square foot of leased space)

See Appendix 13 for an example of how this formula could be applied.

### **Remaining/Unresolved Issues**

Because of the short time line available to the Task Force, and the complexity of the issues discussed, the Charter Schools Funding Task Force focused its attention on the issue of facilities funding for charter schools. As a result certain other issues were not addressed in detail. A partial list of these issues include: (1) charter schools access to federal funding; (2) charter schools access to special education services/funding; and, (3) access, as appropriate, by charter schools to other non-general funds (e.g. Developer Impact Fees, Hawaii School-level Minor Repair & Maintenance from State Individual Tax Returns).



## Sustaining Quality, Hawaiian-focused Charter Schools

An update on KS Support to 17 Hawaiian-focused Charter Schools

January 2011

## Hawaiian-focused Charter Schools

Charter schools have emerged as a vibrant, alternative educational option for Hawai'i keiki and their families. Enrollment at Hawaiian-focused charter schools has grown over 500% over the past 10 years, from 751 in SY0102 to 3884 in SY1011.

This phenomenal increase in the number of charter school students is testament to the **positive choice** and **progressive innovation** charter schools provide students and their families within the public school system.

Through the Ho'olako Like Department, Kamehameha Schools supports 17 HFCS on Kaua'i, O'ahu, Moloka'i and Hawai'i Island. By extending the reach of Pauahi to these schools, KS is able to serve more than 3884 public education students (81% Hawaiian) per school year.



## Charter schools are changing the landscape of education in Hawaii.

### Innovation

- Teachers use culture based strategies.
- Multi-age, interdisciplinary projects
- Data driven instruction, flexible groupings, looping

### Choice

- Smaller class sizes
- Opportunities for meaningful family involvement
- School mission and vision aligned to family value system and needs
- Community driven

Support to these schools forms a *high impact, intergenerational opportunity* for Kamehameha Schools to achieve its mission to improve the capability and wellbeing of Native Hawaiian keiki through education.



Student and Teacher Demographics

## HAWAIIAN-FOCUSED CHARTER SCHOOLS

# A Quick Look at HFCS

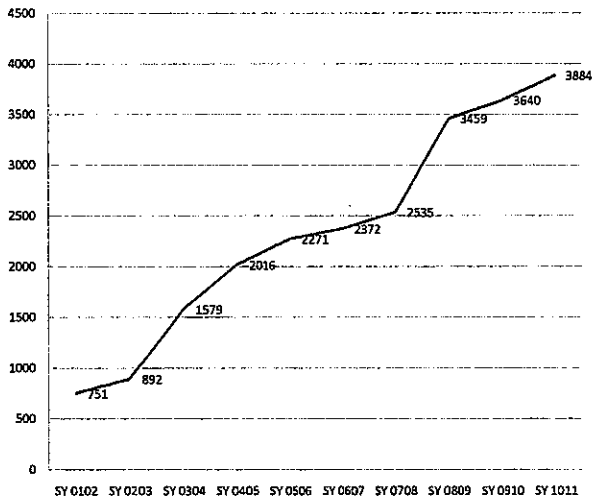


This year HFCS will...

- ...enroll almost 4000 public education students
- ...serve high proportions of children of Hawaiian ancestry (81%)
- ...serve high proportions of socioeconomically (66%) and educationally (15%) disadvantaged children

5

## Hawaiian-focused Charter School Enrollment Trends, 2001-2010

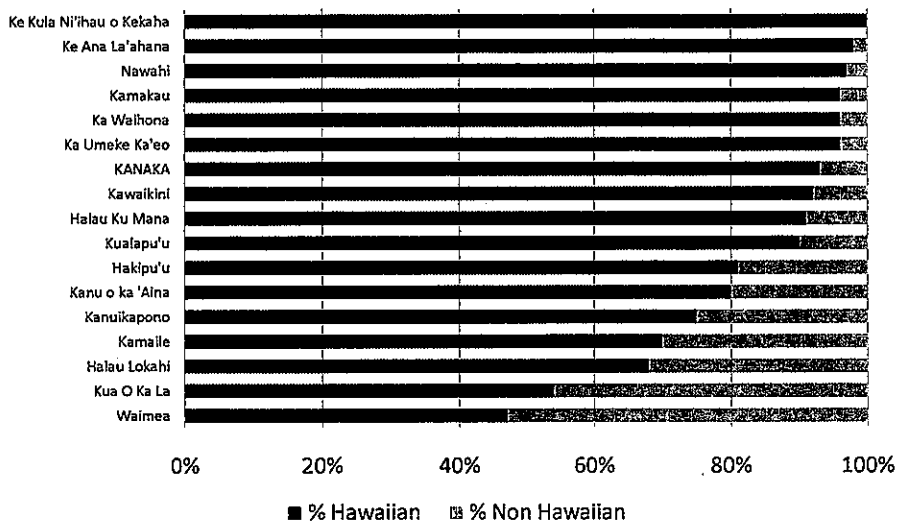


Enrollment at HFCS has...

- ✓ ...grown over 500% over the past 10 years
- ✓ ...increased by an average of 16% per year
- ✓ ...continued to reflect a waitlist, with over 600 students on the waitlist for SY1011



## Hawaiian-focused Charter School Hawaiian Student Enrollment SY 1011

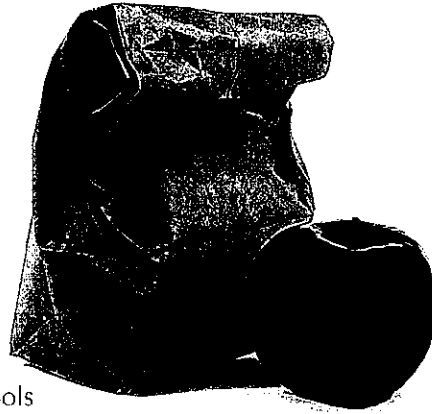


### HFCS Free & Reduced Lunch and SPED, SY 1011

	Free & Reduced Lunch (%)	Free & Reduced Lunch (range)	SPED (%)	SPED (range)
<b>Hawaiian-focused Charter Schools</b>	66%	38% to 100%	15%	2% to 65%
<b>State TOTALS</b>	44%		10%	

### HFCS Teacher Demographics

- ~340 teachers and administrative staff
- 70% HFCS Teachers are Highly Qualified and Meet AYP Requirements
- ~7 years of teaching experience



Hawaiian-focused Charter Schools

## ACADEMICS

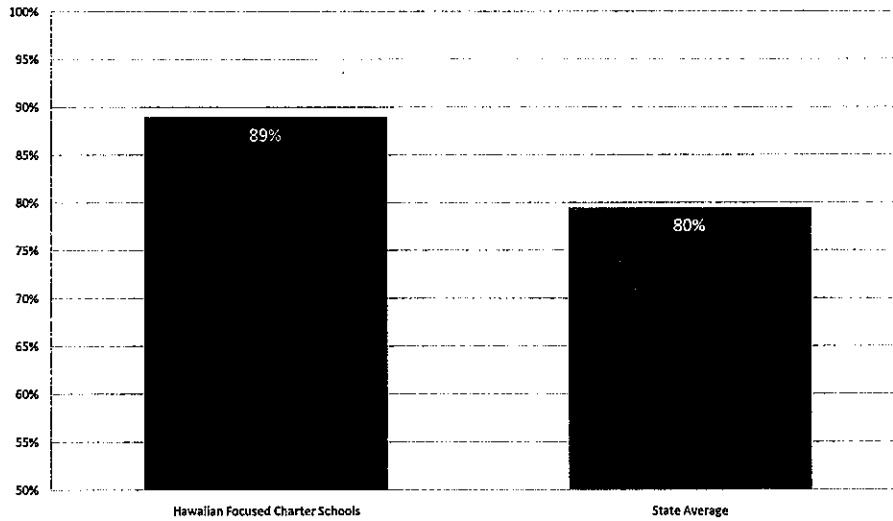
### HFCS HSA Highlights from SY0910



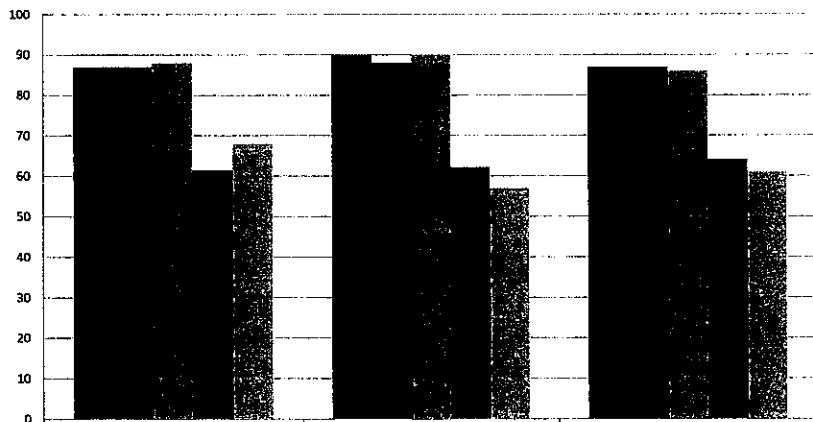
4 of the 17 HFCS made AYP  
 Most made AYP in Reading  
 + Most made gains in overall math scores  
**Evidence of solid, demonstrable educational progress**

School	Reading (56%)		% Increase over 2010	Math (46%)		% Increase over 2010
	SY08-09	SY09-10		SY08-09	SY09-10	
Hakipu'u	63%	69%	4%	10%	25%	15%
Hālau Kū Māna	51%	59%	5%	6%	16%	10%
Hālau Lōkahi	65%	62%	-7%	20%	32%	12%
Ka 'Umeke Kā'eo	73%	65%	-8%	56%	46%	-10%
Ka Waihona	47%	58%	11%	27%	37%	10%
Kamakau	58%	61%	5%	22%	28%	6%
Kawaikini	na	50%	na	na	16%	na
KANAKA	19%	29%	10%	18%	37%	19%
Kanu o ka 'Āina	60%	60%	0%	27%	33%	6%
Ke Ana La'ahana	76%	67%	-9%	18%	18%	0%
Kekaha	30%	20%	-10%	11%	20%	9%
Kua O Ka Lā	43%	39%	-4%	24%	12%	-12%
Nawahī	68%	66%	-2%	63%	61%	-2%

## Comparison of On-time Graduation Rates at HFCS and DOE, SY 2009

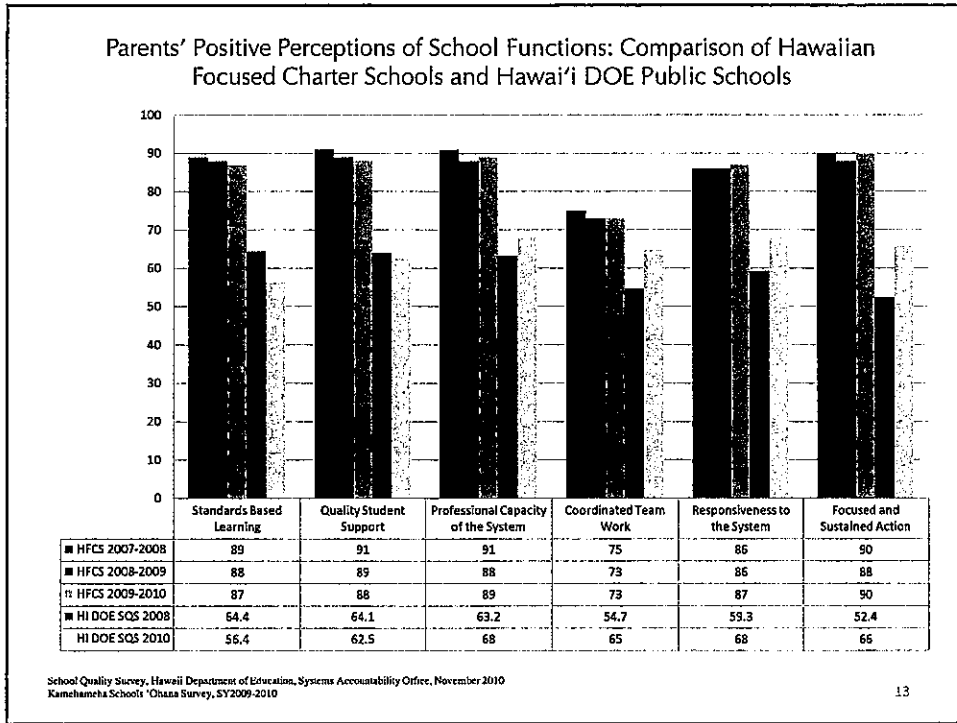


## Parents' Involvement and Satisfaction in HFCS: Comparison of Hawai'i DOE Public Schools and Hawaiian Focused Charter Schools



	Involvement	Satisfaction	Student Safety and Well Being
■ HFCS 2007-2008	87	90	87
■ HFCS 2008-2009	87	88	87
■ HFCS 2009-2010	88	90	86
■ HI DOE SQS 2008	61.5	62.2	64.2
■ HI DOE SQS 2010	68	57	61

School Quality Survey, Hawaii Department of Education, Systems Accountability Office, November 2010  
Kamehameha Schools 'Ohana Survey, SY2009-2010



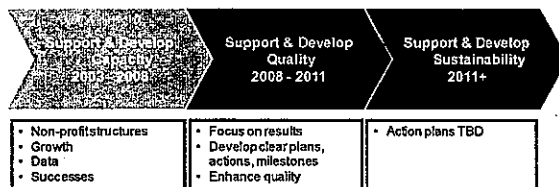
Kamehameha Schools' Charter School Accreditation Support Program  
**SUPPORTING HFCS IN THE PURSUIT OF  
 EDUCATIONAL EXCELLENCE VIA  
 SCHOOL ACCREDITATION**

# Kamehameha Schools' Charter School Accreditation Support Program

## Overarching Goals

- Increase school quality by supporting HFCS in the pursuit of educational excellence via school accreditation
- Strengthen school environments where Culture Based Education thrives
- Demonstrate the effectiveness of Community Engaged Education at HFCS on student achievement

KS charter school support focuses on sustainability, impact, & educational quality.



Kindergarteners at Ke Kula o Kamakou

The current HLD Tactical Plan aims to increase the instructional and operational quality of Hawaiian-focused Charter Schools by focusing on school leadership, instructional supports, long-term strategic planning, data collection and advocacy.

**The Kamehameha Schools' Charter School Accreditation Support program will drive the KS support of HFCS towards a sustained culture of continuous improvement. KS-ASP will provide an opportunity for HFCS to publicly demonstrate their relentless commitment to educational excellence.**

## Kamehameha Schools Accreditation Support Program

For the next five years, KS will support interested Hawaiian-focused charter schools with school accreditation via 4 support strategies:

Accreditation Readiness Assessment

Accreditation Coaching

Accreditation Support Funds

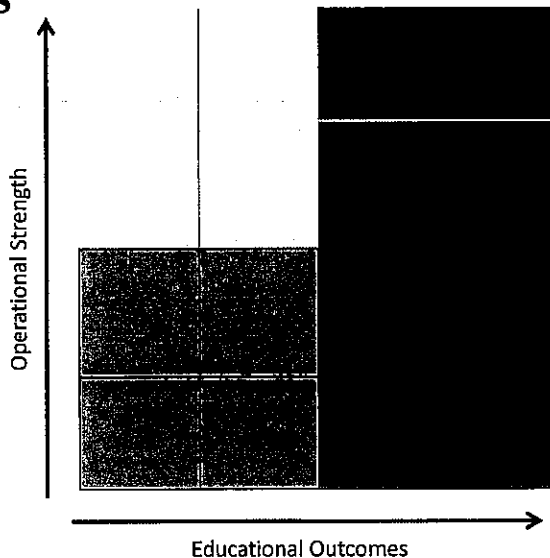
Accreditation Technical Assistance

### Projected HFCS' Progress through Program Stages

	Year 1 FY1011	Year 2 FY1112	Year 3 FY1213	Year 4 FY1314	Year 5 FY1415
Preparing	7 schools	3 schools			
Initial Visit	5 schools	4 schools	3 schools		
Planning and Readiness		2 schools	4 schools	3 schools	
Self Study		3 schools	2 schools	4 schools	3 schools
<b>Accreditation</b>			<b>3 schools</b>	<b>2 schools</b>	<b>4 schools</b>
School transformation via Continuous Growth	1 school	1 school	1 school	4 schools	6 schools

## Sustaining Quality, Hawaiian-focused Charter Schools

- ✓ Based on an accreditation readiness self assessment and interview
- ✓ Affirms the schools' placement into readiness phases
- ✓ Reveals targets for KS resources
- ✓ Identifies priority areas for schools
- ✓ Provides KS a way to track impact of KS-ASP on school quality at HFCS



## HFCS Operational Strengths Index

Readiness Review Assessment Elements	Readiness Review Assessment Elements Description	
<b>Support Organization</b>	Has an experienced supporting 501(c)3 that will act as fiscal agent.	●
<b>Effective School Board</b>	Elects a valid school board that provides appropriate governance.	○
<b>Operational Soundness</b>	Demonstrates sound general mgmt practices, accounting and fiscally responsible reporting.	●
<b>Administrative Capacity</b>	Ensures administrative personnel (non-instructional) have the appropriate skills, experience and capacity to effectively develop and operate the school.	●
<b>Sustainability</b>	Sustainability: Understands the importance of planning for the future and has up to date and complete plans in the following areas: Strategic, Facilities, and Fund Development Plans.	●
<b>Facilities</b>	Facilities provide for the number of students identified in the DIP with adequate space, including classrooms, restrooms and office/administration and meet federal and state laws relating to all county and fire codes, ADA requirements and Department of Health rules.	●

## HFCS Educational Outcomes Index

Readiness Review		Readiness Review Assessment Elements Description
Assessment Elements Name		
Cultural Context	Cultural Context: Established a learning environment that is grounded in aloha, perpetuates culture and promotes cultural customs and practices.	●
Culture Based Connections	Provides instruction and curriculum that reflect Hawaiian Indigenous Education perspectives and methodology and perpetuates Hawaiian culture, language, values and traditions.	●
Student Engagement	Student Engagement: Teachers understand the importance of actively involving students in their learning and implement strategies to meet the needs of all students.	●
Student Achievement-Reading	Growth from previous year:	●
Student Achievement-Math	Growth from previous year	●
Reading Met (58)		●
Math Met (46)		●
Standardized Tests	Standardized tests are administered as required by the state, student outcomes are reported in a timely fashion, and data are used to set school-wide goals and objectives.	○
Student Assessment	Develops and implements a comprehensive plan to monitor, evaluate, and assesses student growth over time and student areas of academic challenge are identified and addressed.	●

## Progress to Date & Next Steps

### Accomplishments

- Contract with HAIS; HAIS Liaison hired
- Identified participant groups by stage of readiness
- 5 schools submitted material for WASC review and initial site visit scheduling
- 6 schools have action plans
- 5 new schools committed to pursuing a strategic planning

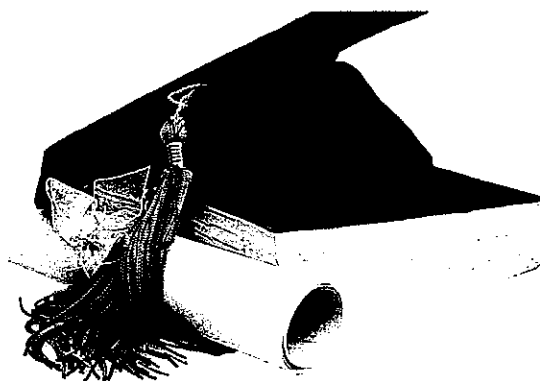
### In-progress

- Identifying resources to address action plan goals
- Codifying process and creating program impact measures and tools
- Convening Accreditation Advisory Board
- Creating program communication plan

### Next Steps

- WASC will conduct a 1-day site visit at 5 pursuing schools
- Securing and deploying resources
- Convene initial Accreditation Advisory Board meeting in January 2011
- Scheduling HLD/HFCS representation on accreditation visitation teams





Hawaiian-focused Charter Schools

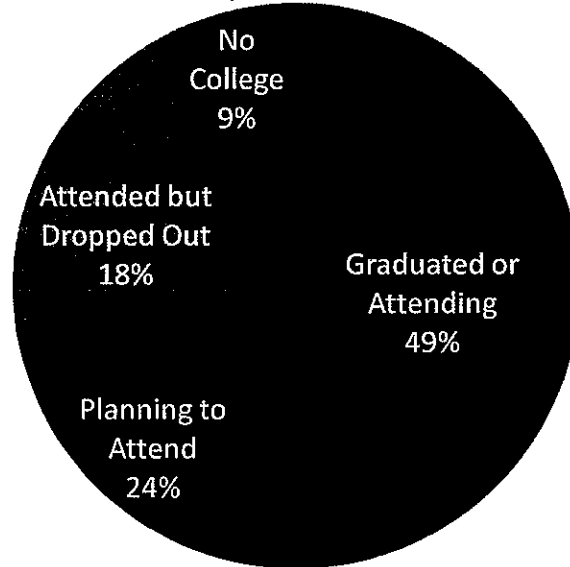
## COLLEGE AND CAREER PREPARATIONS

### HFCS' Approaches to College Preparation

- Due to the smaller size of the charter schools, administration and faculty are able to provide more individualized attention to support students.
- Most schools provide assistance to parents that align with supporting students to college enrollment.
- All of the schools assist students using "outside of the box" approaches to prepare students for college.
- Community support – from family to school administration and faculty, and the local college personnel – plays a positive and significant role in preparing students for college.

"This past year, our school graduated a senior girl. She has two older brothers who also graduated from our school and who currently work in traditional Hawaiian occupations (lo'i worker and fisherman). Her divorced mother was not going to be able to pay for her to go to college. So, while her mom was working on the FAFSA and helping to look for scholarships, this student and her two brothers got together to make and sell things to pay for her college expenses. They prepared and sold dried fish, kulolo, poke for her entire senior year. At the end of the year, the student won the Founder's Scholarship from our school, giving her just enough money to pay her housing at UH Hilo. She is the first one to go to college in her family. Our counselor flew to Hilo with this student, to help her get moved-in and ready for college."

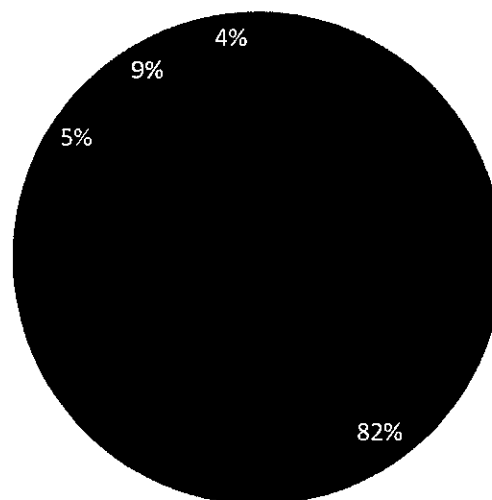
## College Aspirations for HFCS Students



## Employment Rates & Job Satisfaction for HFCS Alumni

■ Employed ■ Homemaker ■ Student ■ Unemployed

- 97% of those employed reported enjoying their job.
- 68% of the full or part-time employed graduates reported that their work benefits the Native Hawaiian community in some way.
- 27% of the full or part-time employed graduates were working in indigenous education following graduation.



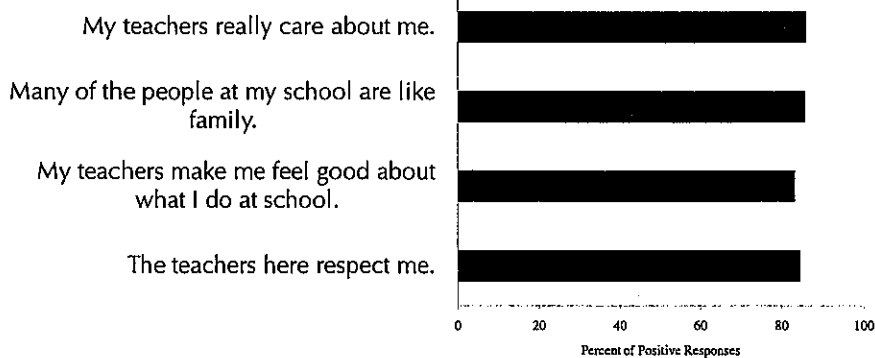
Source: HFCS Alumni Survey Data, SY0910



Hawaiian Focused Charter Schools

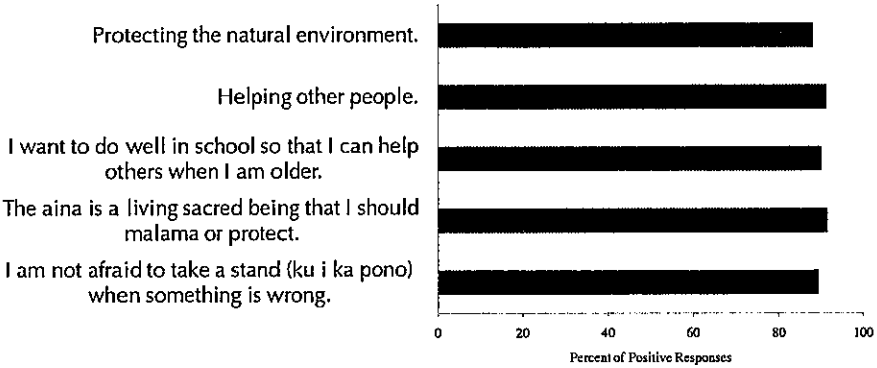
## CIVIC AND CULTURAL ENGAGEMENT

### HFCS Cultivate a Sense of 'Ohana Among Staff and Students



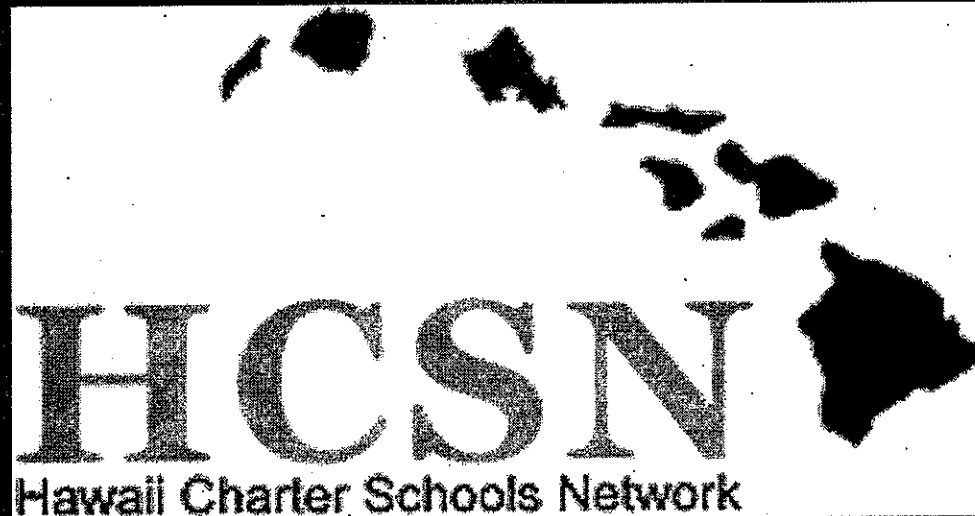
Teacher connectedness is a positive mediating force for this population with high risk factors.

# HFCS Students Practice Community Stewardship & Giveback



- Students in Hawaiian-focused charters are more likely to have knowledge about their communities and to practice environmental stewardship.
- An increased sense of place and pride in where one comes from helps foster greater civic responsibility and sense of community

Kamehameha Schools NS 'Ōpio Survey, SY2009-2010



January 26, 2011  
House and Senate Education Committees  
Informational Briefing  
Hawai`i Charter Schools  
Presented by: Gene Zarro, Past President

# What are we?

- 501c3 Non-Profit Organization serving and representing 31 public charter school members
- Charter Support Organization (CSO)

# Where have we been?

- Formed and operated mostly by Executive Directors of charter schools
- Advocating for charter schools at the legislature

# Where are we going?

HCSN Mission (adopted on  
December 7, 2010):

To advance high quality  
public education in Hawai`i by  
advocating for and  
providing support to public  
charter schools.



**New Priorities!**

- Provide leadership training to new and existing charter programs to ensure quality schools are built from the ground up;
- Offer networking and professional development opportunities to make sure charter school leaders, board members and teachers can share effective practices;
- Perform data analysis to ensure charter schools are evaluated fairly, based on a variety of academic and organizational metrics;
- Serve as the go-to organization for information on charter schools for the media, lawmakers and community
- Organize our schools to advocate for the type of legislation and regulation that will give charters the flexibility and financial support required for successful operation; and
- Work with the CSRP and the CSAO to make sure that standards are high and practices clear.

# Your actions helped

Last year's support for improving charter school law helped Hawai'i to obtain the RTTII grant.

The Charter School Funding Task Force was able to discuss options to provide more financial support to charters including a needs-based facilities funding formula.

However, there is a lot more room for improvement as we are ranked 33 out of 41 states nationwide per the National Alliance of Public Charter Schools: Measuring Up To the Model, Charter School Law Ranking January 2011

# Legislative Agenda

- Maintain current level of per pupil funding, roughly \$6200
- Pass a fair needs-based facilities formula bill
- Allow a year for HCSN to gather the charter community around a system change bill

Reliable and Equitable  
Financial Support  
+ Flexibility  
+ Accountability  
= Innovation

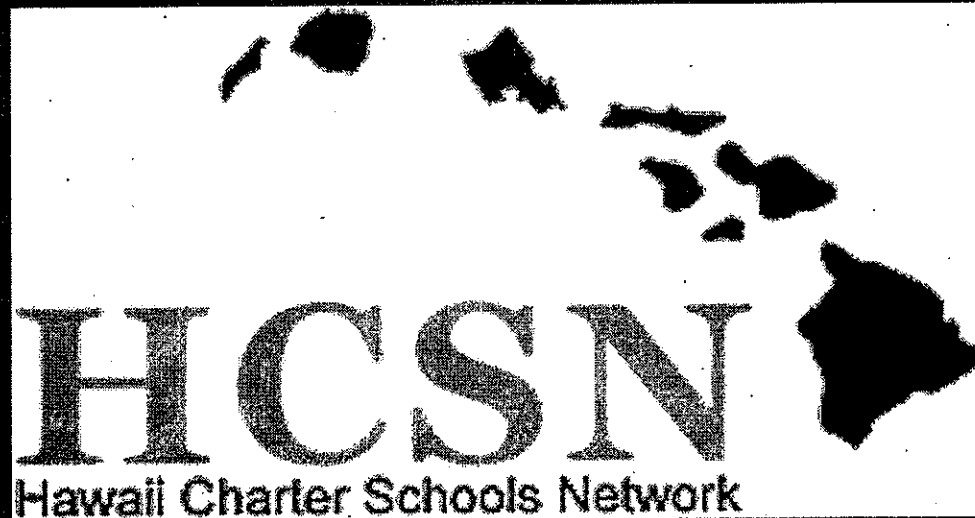
An example of innovation...

## Kihei Public Charter School

- 80% of our graduates go on to college
- A model 21st Century learning community
- Building the pipeline
  - Hawai'i's first secondary STEM program
  - Running Start and UH Maui

**Mahalo!**

from the members of HCSN



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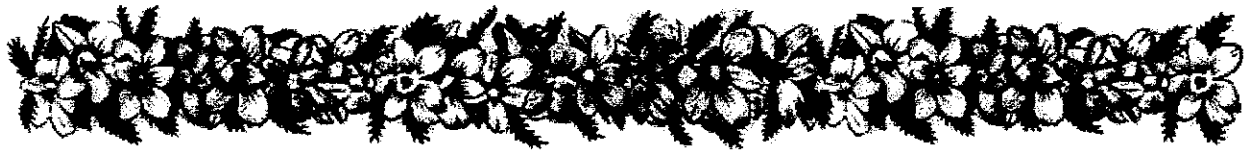
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**Mahalo!**

from the members of HCSN



# Ho'okako'o Corporation

## MEMORANDUM

To: Members of the House Education Committee  
Members of the Senate Education Committee

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Re: **Information about Ho'okako'o Corporation for the Charter School Informational Briefing**

From: Megan McCorrison – Executive Director, Ho'okako'o Corporation

Date: Wednesday, January 26, 2011

Information presented by: Robert Witt – Founding Board Member, Ho'okako'o Corporation, and  
Executive Director, Hawaii Association of Independent Schools

**Ho'okako'o Corporation (HC)** is a 501(c)(3) non-profit organization created by Act 2/2002 to be a Local School Board and education change agent. The organization:

- Partners with conversion charter schools that have high percentages of Native Hawaiian students and are located in high-need Hawai'i communities.
- Collaborates with communities, families, and educators to provide schools with the expertise and resources needed to improve the academic achievement and personal growth of their students.
- Enables local communities to encourage and support the success of their keiki in a 21<sup>st</sup> century learning context via community-based decision-making processes.

### Ho'okako'o Corporation Schools

HC currently oversees three public conversion charter schools: Waimea Middle School, Kualapu'u Elementary and Kamaile Academy. Collectively, these schools serve approximately 1,580 students and represent roughly 19 percent of the total public charter school student population in Hawai'i.

- **Waimea Middle School** – Waimea, Hawai'i Island
  - 270 students in grades 6 to 8
  - 49% of students are Native Hawaiian
  - 63% of students are eligible for free or reduced-cost lunch (Title I)
  - 46 teachers/staff
  - SY 2009-10 HSA
    - Reading: 69% proficient — increase of 10 percentage points from SY 2008-09 to 2009-10
    - Math: 38% proficient — increase of 5 percentage points from SY 2008-09 to 2009-10
- **Kualapu'u School** – Kualapu'u, Moloka'i
  - 400 students in grades pre-K to 6
  - 89% of students are Native Hawaiian
  - 79% of students are eligible for free or reduced-cost lunch (Title I)
  - 99 teachers/staff
  - SY 2009-10 HSA: Exceeded NCLB proficiency targets and achieved AYP
    - Reading: 59% proficient — increase of 6 percentage points from SY 2008-09 to 2009-10
    - Math: 61% proficient — increase of 14 percentage points from SY 2008-09 to 2009-10
- **Kamaile Academy** – Waianae, O'ahu
  - 930 students in grades K to 9
  - 85% of students are Native Hawaiian
  - 82% of students are eligible for free or reduced-cost lunch (Title I)
  - 133 teachers/staff
  - SY 2009-10 HSA
    - Reading: 40% proficient — increase of 8 percentage points from SY 2008-09 to 2009-10

All three schools are the schools of the community. HC's charter schools are State-funded, do not collect tuition, accept all children living in their districts and provide extensive educational support services to a growing population of special education students, migrant students, and English language learners.

Like all charter schools, they abide by DOE collective bargaining agreements with HSTA, HGEA and UPW. As conversion charter schools, their facilities are provided by the DOE; however, routine facility repair and maintenance costs are funded by the schools' State per pupil allocation. These schools must also provide busing services, which are becoming a major financial burden for all Hawai'i public schools.

All of HC's charter schools also receive financial support from Kamehameha Schools, which currently provides annual supplemental funding of up to \$1,500 per student. This supplemental funding:

- Is primarily used to support activities related to curriculum, instruction and assessment, and
- Must be used for HC-approved programs that support students' academic progress.

### **Ho'okako'o Corporation's Educational Change Strategies & Services**

HC provides a wide range of resources and support services designed to enable the implementation of innovative educational programs and practices at each of its schools. These include:

- **Organizational Change Training** for key school leaders.
- **Instructional Expertise** necessary to support effective teaching and learning.
- **Organizational Systems and Support** that ensure accountability, transparency, efficiency and compliance with federal and state regulations on safety, academic achievement, procurement, conflict of interest, employment policies and financial reporting. All schools conduct annual audits.
- **Policy and Advocacy** to support educational innovation and high levels of student achievement.
- **Stakeholder Interface** to support productive relationships with key partners locally and nationally. This includes CSR, CSAO, DOE, Kamehameha Schools and other strategic partners.

### **Examples of Educational Innovation**

HC is committed to helping each of its schools become high-quality, accountable, 21<sup>st</sup> century schools of choice, and supports their individual improvement efforts in a variety of ways. Specific examples include:

- **Expanded Learning Time:** Kamaile Academy and Kualapu'u School are the first public schools in Hawai'i to pilot this nationally recognized "best practice." HC's data shows that ELT has increased student attendance, parent satisfaction with the school and student achievement.
- **Negotiated HSTA Supplemental Agreement to Pilot Annual Teacher Evaluation Process** to support student academic progress and ongoing teacher professional development.
- **Professional Development** focused on employing data-driven decision-making, supporting effective teaching and learning strategies, and providing common planning and articulation time for teachers in order to facilitate the development of differentiated instructional approaches.
- **Frequent Evaluation:** HC's charter schools are required to complete extensive assessments twice a year to determine the effectiveness of their educational programs and to enhance the quality of teaching and learning on their campuses.
- **No Furlough Days:** Students at HC's charter schools cannot afford a reduction in instructional time, especially given the high percentages of Title I, SpEd and ELL students at each school. To avoid instituting furlough days, one school reallocated resources by decreasing its staff at the beginning of the year, and all schools drew from their financial reserves to fund the additional payroll costs. The decision against implementing furloughs resulted in improved HSA scores and attendance, greater parental satisfaction and enhanced community support at all of HC's schools.
- **Supported Waimea Middle School in securing a community partnership to develop what had become the "model" school garden on Hawai'i Island.** Provides an experiential outdoor learning experience that is fully integrated into core curriculum and also supports improved nutrition and environmental stewardship.

- **Accessed Race to the Top and School Improvement Grant federal funding to support education reform models in a 21<sup>st</sup>-century learning context.** As one of the DOE's six Race to the Top Priority Schools, Kamaile Academy will be able to access part of \$3 million in federal School Improvement Grant (SIG) funding and \$75 million in Race to the Top direct funding to schools within the 'Zone of School Innovation' along the Waianae Coast.