



Charter Connection

February 2020

YOUR MONTHLY UPDATE FOR ALL THINGS CHARTER

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Director's Message

The [2020 General Session](#) of the 63rd Legislature began on January 27 and will end on March 12. If you are interested in tracking the happenings or getting involved this session, the following resources may be helpful:

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--*Jennifer*

Charter School Compliance Tip: Proper Board Governance

Proper board governance seems to be the biggest challenge for charter schools in Utah. Many of Utah's charter schools have board members who are new to governance and struggle to understand the proper role of the governing board. In Brian Carpenter's book "Charter School Board University," he lists 11 board actions, decisions or characteristics that lead charter schools away from successful student outcomes. These 11 are:

1. Dominated by the founder of the school
2. Dominated by the management company
3. Violations of the duty of loyalty
4. Violations of the duty of oversight
5. Violations of the duty of obedience
6. Lack of internal cohesion
7. Well-intentioned people but lacking capacity
8. Excessive board member turnover
9. Behaving unprofessionally toward the school's staff
10. Role confusion among parent-board members
11. Individual board members acting outside of their authority

There are many resources available to boards that want to improve. If your board is struggling with one or more of the 11 actions, decisions or characteristics, seek training from the SCSB, UAPCS, UCN or contract with an outside provider. Proper board governance plays a key role in the success or failure of a charter school.

Dear Dr. Ed,

As spring gets closer and closer, I feel myself thinking a lot about change. I know my teachers feel it too. Some are looking for new positions, some are retiring, some are staying home, or coming back. Change seems to be one of the biggest constants we have as school leaders. Whether it is me, or one of my employees, how can I best plan for changes and make sure my school stays as strong as it is today?

Sincerely,

Curious about Change

Dear Curious,

Great question! Did you know the Hanover Research Team found that for most schools, current hiring practices often rely on “replacement filling,” which entails waiting for a position to become vacant before searching for qualified candidates. This retroactive process leaves new appointees with little direction, and can exacerbate turnover.

Succession planning, or “proactive filling,” can be used to build a supply of teachers and leaders by anticipating future needs and preparing for vacancies ahead of time. Succession plans use foresight to develop objectives and evaluative criteria in order to measure the success of the program and to continue to place qualified candidates in appropriate roles.

While there are numerous ways to develop successful succession models, a key component of any model is an outline, as shown below:

1. Set the Stage: Contemplate the purpose, goals, and expectations of the succession planning process.
2. Plan for the Future: Use succession planning as a process for reflecting on your school’s future.
3. Assess Current Landscape Requirements: Build a “leadership code” that explains leadership characteristics and behaviors that drive success in the school.
4. Conduct Effective Evaluations: Without honest discourse about an individual’s strengths and weaknesses, proactive development opportunities cannot be deliberately pursued.
5. Assess Mobility: Complete a deep bench strength analysis, which yields measures concerning the depth of leadership talent within the organization.
6. Develop Leaders to Fill the Gaps: Each participant should have an individualized development plan. The plan should ask such questions as: For what key position should this person be prepared? What kinds of competencies should be developed? What are the individual’s career objectives?
7. Create Individual Transition Plans: Ideally, the replacement of individuals should involve substantive overlap allowing for on-the-job training and a smooth handoff of responsibility.
8. (Re)Assess Your Program: Understand that succession planning is a fluid and continual process, and requires regular assessment and adjustment.

--Dr. Ed U. Tation (from HanoverResearch.com)

Theme of the Month

In the October 2019 newsletter, we mentioned that starting with fiscal year 2021, the State Auditor’s Office (SAO) would start requiring that all Utah charter schools report their annual financial statements under GASB. The SAO has revised their conclusion. Please see Auditor Alert 2019-01 REVISED DRAFT at:

https://gallery.mailchimp.com/5f233bf90eb35eff2448bc48e/files/e30ce5c9-61a7-43a1-bf23-dc139bdbce17/2019_01_Source_of_GAAP_for_Charter_Schools_Revised_Draft.pdf

Initially, the SAO moved to require GASB reporting for all charter schools because charter schools were deemed governmental entities that could be dissolved when it terminated its agreement with the State Charter School Board (SCSB) and school property was reverted back to the SCSB after settlement of all outstanding obligations. However, the SAO is not aware of any charter school agreement containing a clause that requires unilateral dissolution as a result of an action taken by the SCSB or the Utah State Board of Education (USBE). Since the state cannot dissolve a closed charter school, it doesn’t completely meet the requirement to be a governmental entity. In conclusion, the revised draft states that, Utah charter schools that are component units of school districts and institutions of higher education must follow GASB. All other charter schools must follow FASB unless that specific school meets at least one of the criteria specified by GASB.

In addition, the SOA, the USBE, and the SCSB are working on adopting language that would require charter schools to report their ending program and restricted fund balances in their annual financial statements which would tie to the ending total net asset balance. If you have any feedback, suggestions, or concerns about reporting your ending program and restricted fund balances, please send them directly to Stewart Okobia at Stewart.Okobia@schools.utah.gov

Opportunities for Schools

- Has your charter school governing board done its annual training on the Open and Public Meetings Act yet? The Office of the State Auditor has a training for you
<http://training.auditor.utah.gov/courses/open-and-public-meetings-act-2019>
- The State Charter School Board has a School Calendar Guidance Form available on their website, found here:
<https://www.utahscsb.org/general>
- The State Charter School Board is excited to offer a free professional development seminar for Utah charter schoolteachers and leaders. See the attached flyer for more information.
<https://twitter.com/UtahSCSB/status/1207393088236347399?s=20>



Outstanding in Our Field

- Beehive Science & Technology Academy students Sidor Clare and Kassie Holt have been named Utahns of the year by the Salt Lake Tribune. Way to go!
<https://sltrib.com/news/2019/12/25/salt-lake-tribune-readers/>
- The National Afterschool Alliance (NAA) has selected Ms. Susie Estrada (Dual Immersion Academy) as one of NAA'S Next Generation of Afterschool Leaders 2020! Awesome! <https://naaweb.org/naas-next-generation-of-afterschool-leaders-2020#SusieEstrada>
- Dual Immersion Academy's Jazmeen Gonzales was awarded as January 2020's Employee of the Month of SCSB Authorized Schools for being the glue that holds DIA together. Congrats!
- On Martin Luther King Jr. Day, students from Ascent Academies performed the National Anthem at the Maverik Center as the Utah Grizzlies battled the Idaho Steelheads.

February 2020

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
					1	2
3	4	5	<u>USBE Meeting</u> 6	<u>USBE Committees</u> 7	8	9
SCSB Hearing/ Charter Directors 10	11	12	SCSB Meeting 13	14	15	16
President's Day 17	18	19	20	21	22	23
24	25	26	27	28	29	

March 2020

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
						1
2	3	4	<u>USBE Meeting</u> 5	<u>USBE Committees</u> 6	7	8
<u>Charter Directors</u> 9	10	11	<u>SCSB Meeting</u> 12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

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