

A person wearing a blue jacket is riding a dark horse away from the camera down a dirt path in a forest. The trees on the left have bright yellow autumn leaves, while the trees on the right are mostly green. The ground is covered in fallen yellow leaves. The scene is brightly lit, suggesting a sunny day.

Idaho's Rural Charter School Development Opportunities

Treasure Valley Classical Academy
September 30, 2019
Fruitland, Idaho

INTRODUCTION FROM REP. JUDY BOYLE

Welcome to District 9 and our beautiful new Treasure Valley Classical Academy! We are excited for the opportunity this school presents for students, families and the community, along with the amazing restoration of this iconic building.

There are many dedicated people to thank for seeing this dream fulfilled and it starts with America's Can-Do ethic. We refuse to take NO for an answer, which is an important lesson for our children. America's Dream of Freedom is a shining example of that ethic. I am certain the leader of this school, Mr. Steve Lambert, will keep that ethic front and center for the students who enter here.

The Albertson's Foundation's support has been essential for Idaho education and we greatly appreciate them. I'm going to embarrass Terry Ryan right now in mentioning his important leadership and vision for Idaho's children. And thank you to USDA for catching the education dream and becoming involved in our state.

Rural Idaho is a hardy, resilient population whom have always had to work hard to survive and prosper. We are not afraid to tackle tough issues and fight back when necessary to give our children the best future possible. A strong, well-grounded education is a vital beginning for our future leaders. This Charter School, and others like it across Idaho, provide that learning experience.

In the Idaho Legislature, I have always been a strong voice for Rural Idaho. Our rural areas are too often passed by and overlooked. Our citizens choose to live away from the city. We have amazing, brilliant, well-accomplished people among our populations. Rural people bond together to care for our neighbors and to provide opportunities for our children. What we lack in money, we make up in spirit and work. I remind my colleagues often of rural accomplishments and rural needs using real life examples. They also know I never give up and NO is not an acceptable answer.

One example of rural people pulling together started over 50 years ago in my community of Midvale, about an hour north of here. Parents and grandparents saw a need for a local swimming pool instead of kids swimming in irrigation ditches and the river. The city provided the land,

farmers and ranchers brought their equipment to town and dug out the hole, cement was poured, clean water from the city was provided, add moms volunteering as lifeguards and the Midvale Swimming Pool was born. It has gone through many upgrades through the years with the funds provided by donations, a yearly bike-a-thon and our annual 4th of July famous BBQ dinner with all the food donated. Countless area children and adults have safely learned how to swim and continue relishing many summer days in the water. The word NO was never accepted.

That's how we get it done in rural Idaho!

Thank you all again for being here and discussing how to make more dreams come true!

Judy

JIM GRIFFIN MOMENTUM STRATEGY & RESEARCH

USDA Rural Development and Charter Public Schools

- Charter Financings, 2008-18
- Key Findings
- Lessons Learned and Next Steps

Rural Development

Rural Development's mission is based on a common goal to helping improve the economy and quality of life in all of Rural America

Community Programs: We accomplish this by providing financial programs to support public facilities and services such as housing, health clinics, emergency services and utilities;

Business Programs: The goal is to promote a dynamic business environment by investing (via guaranteed loans, direct loans for revolving loan fund programs, and grants) in projects that create or preserve quality jobs, help agricultural producers & rural small businesses reduce energy costs & help meet the nation's energy needs, and increase income to agricultural producers through facilitating value-added activities.

Rural Development mission is accomplished through three agency departments:

- **Rural Housing Service – RHS**
 - Direct & Guaranteed loans for Single Family
 - Repair Loans & Grants for Very Low Income Homeowners
 - Rental Subsidy for Multi-Family Housing Complexes
 - Community Facilities Loans & Grants
- **Rural Utility Service – RUS**
 - Direct & Guaranteed loans for Water & Wastewater projects
 - Technical Assistance
 - Electric & Telecommunication Loan & Loan Guarantees
- **Rural Business-Cooperative Service – RBS**
 - Guaranteed loans for Business & Industry
 - Revolving Loan Fund loans to non-profit Economic Development Organizations
 - Grants to public bodies and non-profit organizations for technical assistance to facilitate private business development
 - Grants to rural small businesses and agricultural producers for energy projects or value-added agriculture projects

What is rural?

The definition of rural varies from program to program due to enacting legislation or statute.

Most simply put, the following population limitations apply:

RUS – Water and Waste Programs – 10,000

RHS – Community Facilities – 20,000

RHS – Housing – 35,000

RHS – Multi – Family Housing – 25,000

RBS – Business Programs – 50,000

Population is based on the city where the house, business or facility is located

A little about USDA RD Financial Assistance

- \$215 **Billion** portfolio across programs
- In the top 15 largest banks in the nation
- Local Delivery
 - 47 State Offices and Area Offices
 - Most employees live and work in Rural America

Community Facilities and Rural Business-Cooperative Service

CF FY19 \$3 Billion in loan & grant funding
CF Interest rate 3% as of October 1st
<20,000 population CF
Up to 40 year repayment or life of the facility. Typically 20-30 year terms.

RBS FY19 \$1.6 Billion in program funding
Interest rate on the B&I loan guaranteed by RBS is negotiated between the Lender and the Borrower
<50,000 population for RBS

Building capacity: technical assistance and training grants

Grants (tribes, household water wells)

Access to affordable infrastructure for small systems

Low-interest rate loans (2-4%); 40 year repayment terms

Guaranteed Loans for business development that create and save jobs

Application development

Local delivery of program

Eligible Entities

Community Facilities:

- Public Bodies (City, County, District, Authority, etc.)
- Certain not-for-profits such as Associations, Cooperatives
- Federally Recognized Tribes

Applicant must own or control the facility, must have local management control or broad-based ownership, must have certain legal authorities

Business and Industry (B&I) Loan Guarantee Program:

- Proprietorships, partnerships, corporations, nonprofits (**note:** nonprofit businesses that derive more than 10% of their annual gross revenue from tax deductible charitable donations **are not** eligible), cooperatives, tribes, or political subdivisions
- The Borrower must be engaged, or proposed to be engaged, in a business (note: for the purposes of B&I, a school is considered a “business,” and is evaluated on its capacity to generate revenue, service debt, and save or create jobs)

CF Eligible Projects

- Construct, enlarge, extend or otherwise improve facilities
- Essential community facilities are those public improvements necessary to aid the beneficial and orderly development of a community
- Need to demonstrate local support and local control
- Can pay for soft costs, Engineering, Architect, legal, interim costs
- Can refi existing debt in some cases. (< 50% of the project)

B&I: Purpose; Eligible Uses of Funds

Purpose:

- Encourage commercial financing of rural businesses, thereby creating & saving rural jobs and improving the economic & environmental climate of rural areas
- The B&I program is lender driven. Rural Development guarantees the loan negotiated by the commercial lender; the lender makes and services the loan

Eligible Uses of Funds:

- Business acquisition, construction, repair, modernization, & development
- Real estate, buildings, and equipment
- Inventory, supplies, & working capital (no lines of credit)
- Debt refinancing (generally less than 50% of total project)
- Ineligible: Line of Credit

Charter Schools funded by RD

- Sandpoint Charter School
- Falcon Ridge Public Charter School
- Syringa Mountain School, Inc.
- Blackfoot Charter School
- Monticello Montessori Charter School, Inc.
- Taylor's Crossing Public Charter School
- White Pine Charter School, Inc.
- Idaho Science & Technology
- Chief Tahgee Elementary Academy, Inc.
- B&I: Moscow Charter School
- B&I: Vision Charter School (Caldwell)
- B&I: Connor Academy (Chubbuck)

Idaho Policy

- Idaho currently has ten (12) Charter schools funded - 9 CF and 3 B&I
 - Note: typically, B&I is considered for financing only after the project is determined to be ineligible for CF financing, generally because of the difference in definition of “eligible rural area” (population limit -- CF: 20,000; B&I: 50,000)
- Before considering financing of a permanent facility, we strongly recommend new charter schools operate for 2 full school years - (means 3 years – 1 getting set up and 2 years with students)
- They must demonstrate that they have the managerial and financial capacity to successfully operate a Charter School

Idaho Policy

- Some of our borrowers in the most sustainable financial condition started out in portable units



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- 1) Mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;
- 2) Fax: (202) 690-7442; or
- 3) Email: program.intake@usda.gov.

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Expanding Opportunities for Rural Students

Idaho Rural Charter School Opportunities

September 2019

BACK TO SCHOOL TOUR

- The Secretary and several assistant secretaries traveled
- 18 states, 45 public events
- Schools of all types
- Deputy Secretary in Idaho



EDUCATION FREEDOM SCHOLARSHIPS (EFS)

- **“All students need to be freed to pursue the education that will unlock their potential and unleash their creativity so they—and our country—can achieve unlimited success.”**
– Education Secretary Betsy DeVos
- **Federal tax credit for donations to SGOs**
- **Scholarships could be used for**
 - Apprenticeships, dual enrollment, CTE, online learning
 - Transportation
 - Tools, supplies, PPE costs
 - Credit recovery, remedial courses, tutoring services

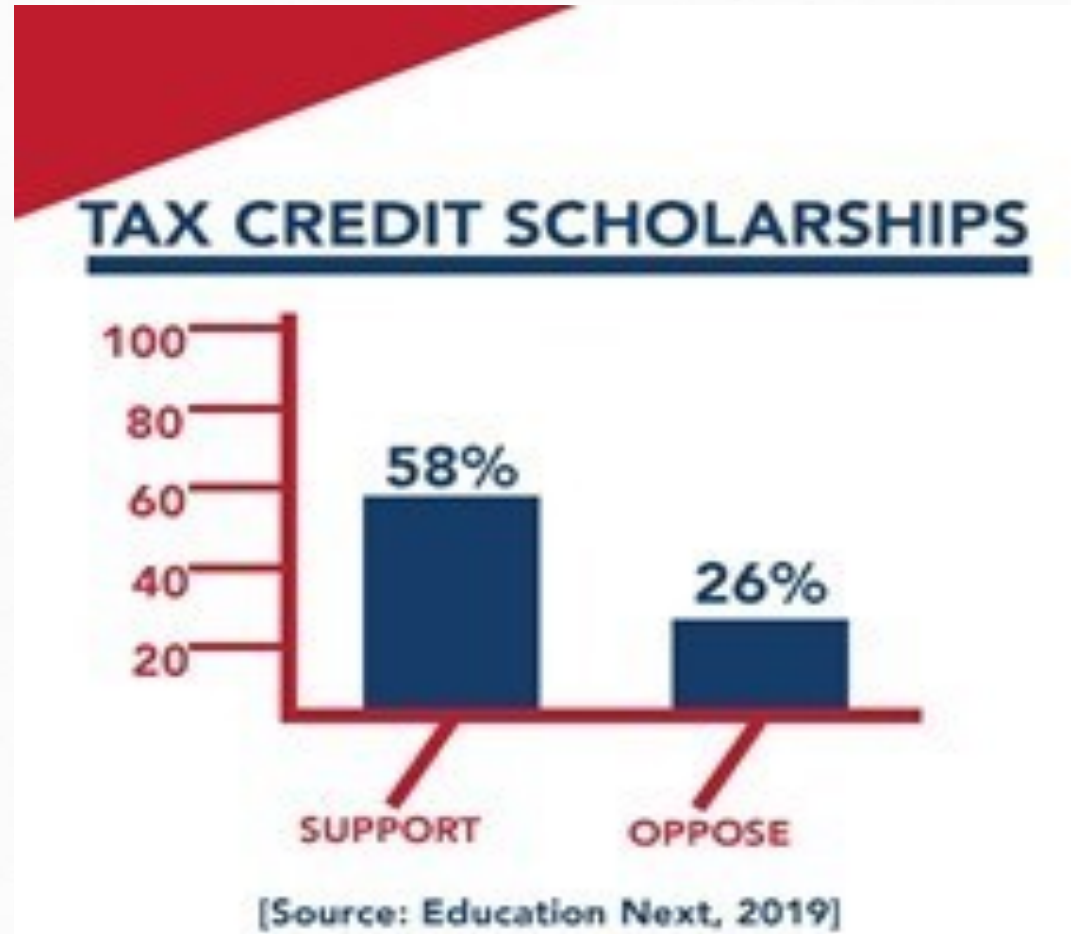


EDUCATION FREEDOM SCHOLARSHIPS (EFS)

- Not about choosing different school buildings
- Each student is an individual with different interests and aspirations
- Providing all students with the freedom to find their path to success



EDUCATION FREEDOM SCHOLARSHIPS (EFS)



RURAL CHARTER SCHOOLS

- Charter schools don't work in rural areas?
- No one-size-fits-all solution
- Secretary DeVos to students:

“We’re here because of you—and for you. In fact, everything about education should be focused solely on you. After all, as a nation, we’ve committed to help each student prepare for the future. Some people confuse that as a commitment to a building, to a system, or to a particular way of learning. But your education must be about who you are and all that you see for yourself, for your family, for your community, and importantly for our country.”



CHARTER SCHOOL PROGRAMS (CSP)

- **Major purposes of CSP:**
 - expand opportunities for all students, particularly traditionally underserved students, to attend charter schools and meet challenging State academic standards,
 - provide financial assistance for the planning, program design, and initial implementation of public charter schools,
 - increase the number of high-quality charter schools available to students across the United States,
 - evaluate the impact of charter schools on student achievement, families, and communities,
 - share best practices between charter schools and other public schools, and
 - encourage States to provide facilities support to charter schools; and support efforts to strengthen the charter school authorizing process.



CHARTER SCHOOL PROGRAMS (CSP)

- **CSP provides funds to:**
 - create promising new public charter schools,
 - replicate high-quality public charter schools, and
 - disseminate information about effective practices within charter schools.
- **Federal funds also available to help charter schools:**
 - find suitable facilities,
 - reward high-quality charter schools that form exemplary collaborations with traditional public schools, and
 - invest in other national initiatives that support charter schools.



CHARTER SCHOOL PROGRAMS (CSP)

- **CSP National Dissemination Program successful applicants (FY 2018):**
 - National Alliance for Public Charter Schools
 - Breakthrough Charter Schools
 - Building Hope
 - California Charter Schools Association
 - Colorado Charter School Institute
 - NACA Inspired Schools Network
 - National Association of Charter School Authorizers
 - National Charter Schools Institute



Michael Chamberlain Michael.Chamberlain@ed.gov

History of Charter Schools in Idaho

Chris Yorgason

- First charter law, nationally, was passed in Minnesota in 1991
- Idaho followed suit in 1998

Highlights of the 1998 Idaho law

- Purposes of charter schools (intent to accomplish all of the following):
 - Improve student learning
 - Increase learning opportunities for all students
 - Include the use of different and innovative teaching methods
 - Create new professional opportunities for teachers, including being responsible for the learning program at the school site
 - Provide parents and students with expanded choices in educational opportunities
 - Hold schools accountable for meeting measurable student educational standards

Highlights of the 1998 Idaho law

- Charter schools became part of the state's program of public education
- Not more than 60 schools could be approved in five years (hard limit of twelve per year)
- Only one authorizer – boards of trustees of local school districts
- No more than one charter per year per school district
- Charters could be approved for up to five years, but no automatic renewals ("Renewals may be granted")

Highlights of the 1998 Idaho law

- Charters could be revoked if the charter school:
 - Committed a material violation of the charter
 - Failed to substantially meet any of the student educational standards identified in the charter petition
 - Failed to meet general accepted accounting standards of fiscal management
 - Failed to submit required reports to the authorizer; or
 - Violated any provision of law

Highlights of the 1998 Idaho law

- What happened?
 - When charters look to renew beginning in 2003, it became very difficult for some schools
 - Some authorizers sought to rewrite charters in order to grant renewals
 - Charter school began demanding authorizer choices
 - Some schools had good relationships with districts

Highlights of the 2004 Idaho law

- Purposes of charter schools was changed from “all” to “any” and a seventh purposes was added – to utilize virtual distance learning and online learning
- Only six new schools could be authorized per year
- Clarified that multiple charters could exist in a single school district, but only one could be authorized each year
- Charter schools became subject to board ethics, open meetings and public records laws and professional ethics; also received tort protection
- Revisions to petition requirements

Highlights of the 2004 Idaho law

- Five year terms were removed
- If authorizer found any violations (as existed in 1998 law), then could issue a notice of defect, which if not cured after reasonable notice, charter could be revoked
- Public charter school commission is created (three current or former trustees of school boards, three current or former charter school board members, one member at large, not directly associated with the public education system, all appointed by governor)

Highlights of the 2004 Idaho law

- What happened?

- Many existing schools switched to the Commission
- Majority of new schools authorized by the Commission
- Commissioners were eventually deemed hostile to charters
- Commission enforcement of charters often felt heavy handed, often issuing notices of defects based upon immaterial violations of charters

Highlights of the 2013 Idaho law

- Many changes
 - Facilities funding for charter schools
 - Authorizer fees for authorizers
 - Performance certificates initiated; performance frameworks established
 - Five-year terms reinstituted (three years for new schools)
 - Renewals are mandatory if charters meet all conditions of performance certificate
 - Additional authorizers are approved (universities and colleges)
 - Make of Commission adjusted, no board membership required, must show understanding of and commitment to charter schools; three appointed by governor, two by senate and two by house

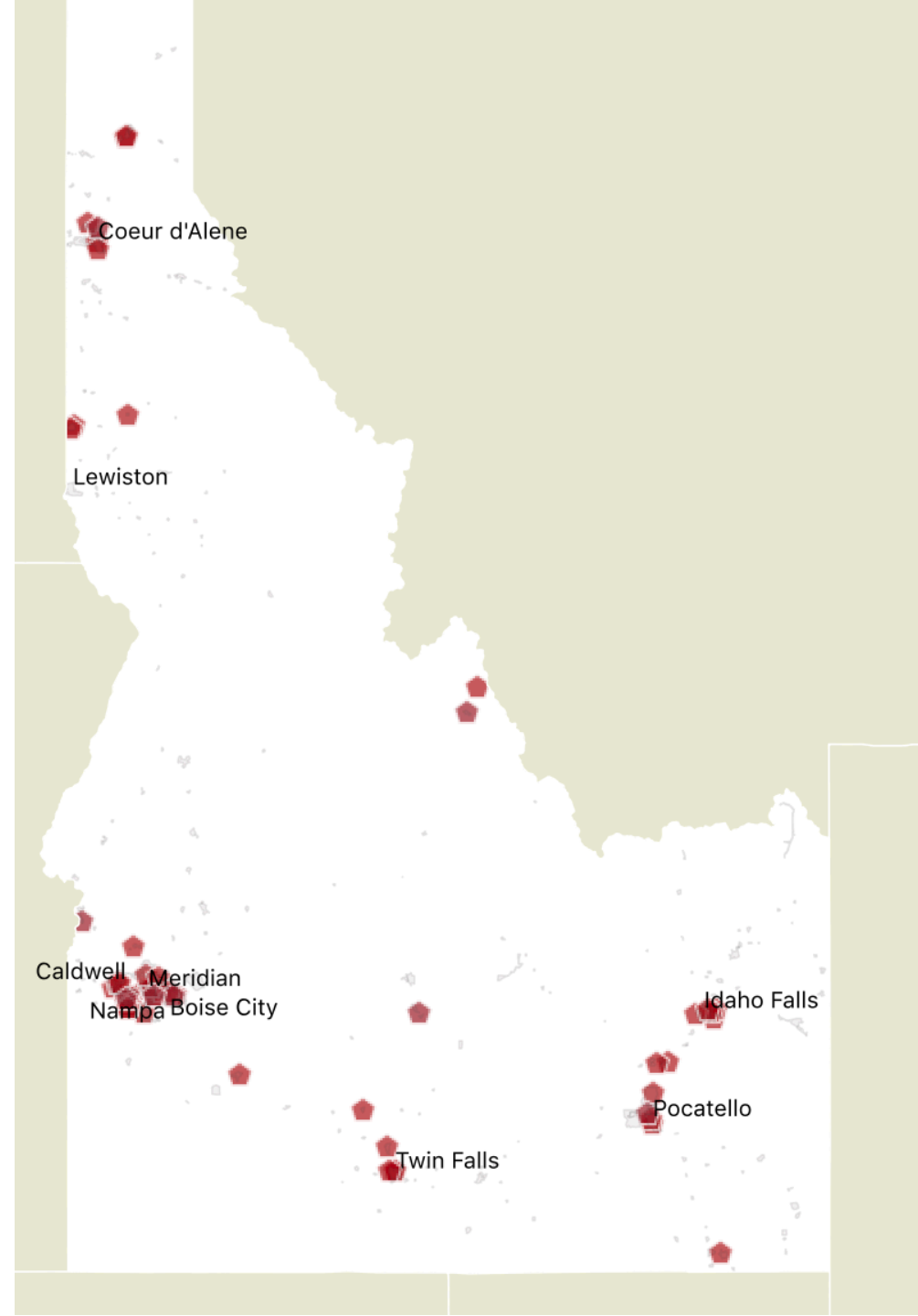
Where are we in 2019?

- More than 80% of all charter schools are authorized by the Idaho Public Charter School Commission
- Other legislative changes have been made (streamlined application processes, enhanced facilities options, among others)
- Continued dissatisfaction among some schools regarding Commission oversight
- Some schools asking for new authorizer options
- After 15 years, feels a little like we are back where we started
- My belief — charters and districts are best off when there is a good relationship between a charter school and local school district authorizer; worst off when that relationship is toxic

Current Idaho Charter Schools

51 charter schools serving
19,500 students

6 virtual charter schools serving
4,500 students



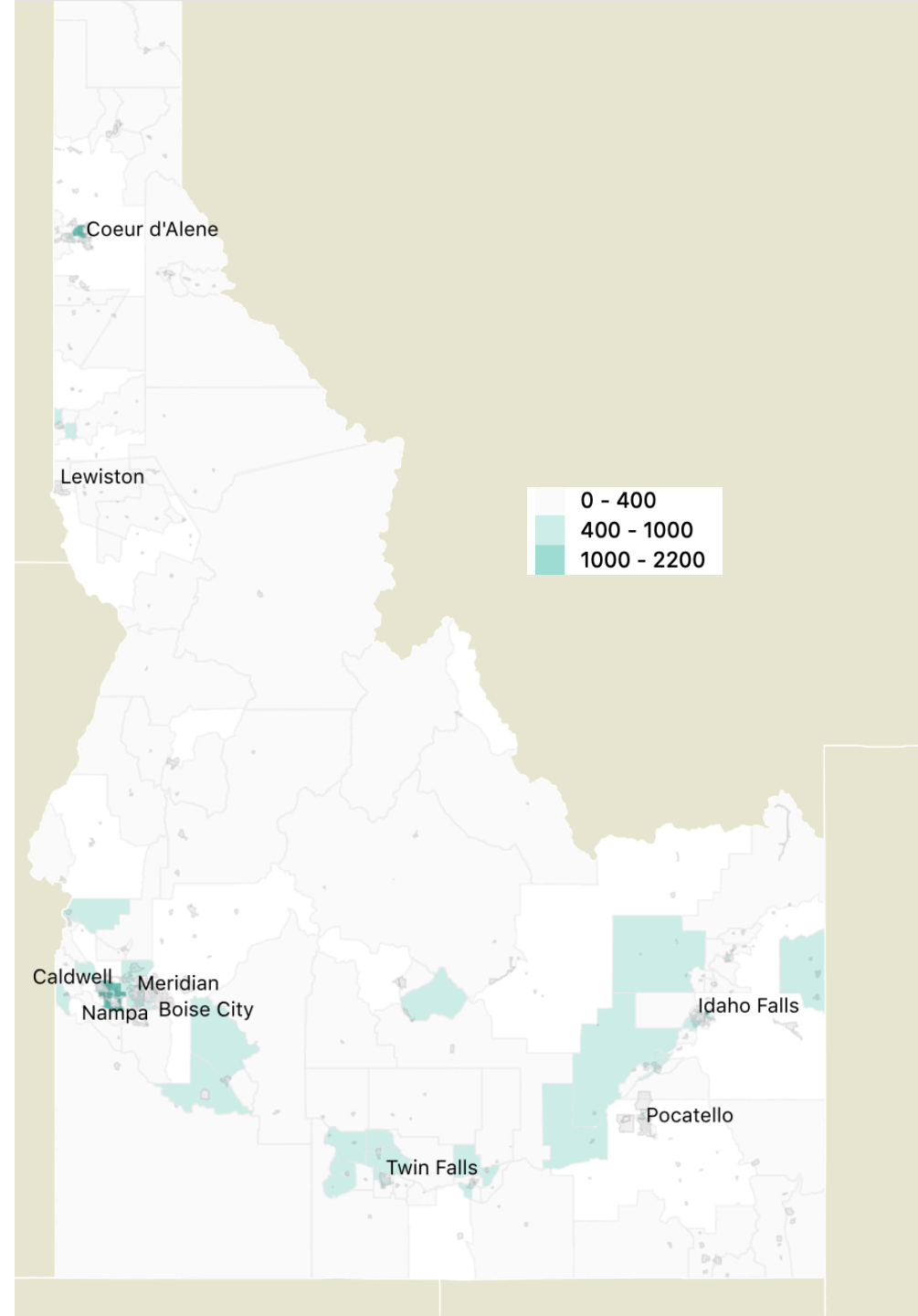
New Charter Seats in the Treasure Valley

Opened in August 2019

- Elevate Academy in Middleton
- Forge International School in Middleton (Rural)
- Treasure Valley Classical Academy in Fruitland (Rural)
- Compass in Meridian will open a new building adding 224 students

School-Age Population

Change in K-8 age student population by 2024



Data and estimates come from EcoNorthwest

Summary of Current Efforts

- Since 2014, we invested **\$20 million in direct grant support for 18 new or expanded schools.**
 - Almost 90% of these direct grants have been allocated to support the launch, growth and expansion of 15 public charter schools.
 - The remainder to two private schools and a district innovation school.
- During the same time, an **additional \$25 million has been invested by the Foundation through program related investments (PRI) managed by our important partner Building Hope.** This has supported the construction of nine charter school facilities
- We have **leveraged another \$3.54 million in funding from seven additional partners** (e.g. Charter School Growth Fund, New Schools Venture Fund, Louis Calder Family Foundation)
- We applied and received **\$17.1 million in 2018 from the USDOE's Charter Schools Program** to fund the start-up, replication and expansion of new charter school seats. Based on revisions and amendments shared with the USDOE **this number may be increased to \$22 million in 2019.**

Impact

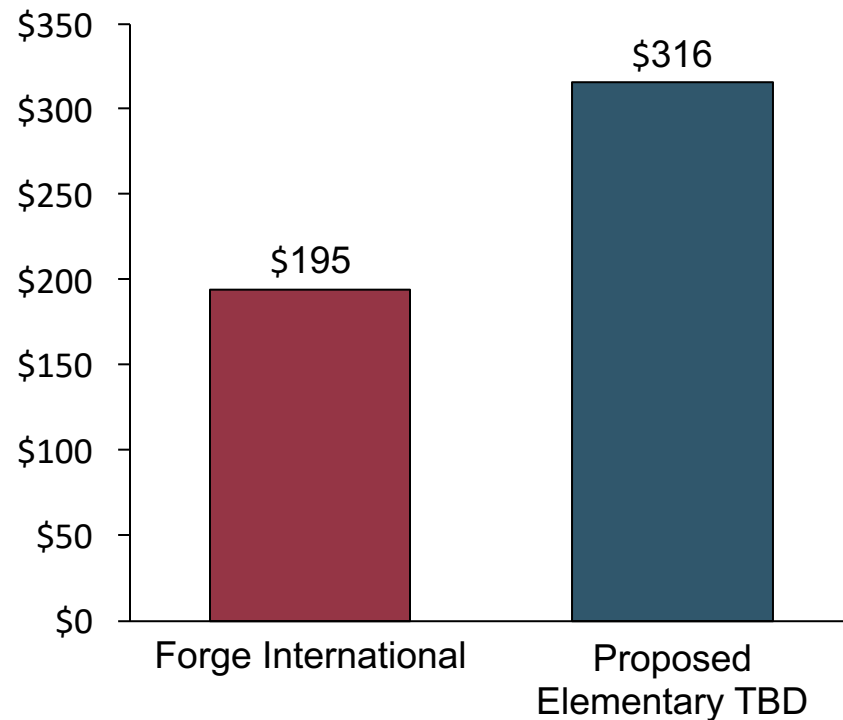
- Idaho Ed News reported in March that
 - The state's total 2019 public K-12 school enrollment was 307,416; **up 5,084 from a year earlier**
 - **Four in ten of these new seats were public charter schools**
 - Charter schools enrolled 24,006 in February 2019; **up 2,070 students from the year before**
- In late June, Macke Raymond from [Stanford's CREDO](#) shared a presentation on Idaho charter school performance with the Idaho State Board of Education. She reported charter school students "significantly outperformed their peers in reading tests." Students in one of **Idaho's rural charter schools** "gain 30 days of learning in reading and 59 days of learning in math over a year compared to students in traditional rural district schools."
- Since 2016, the Foundation has invested \$1,330,000 in the Idaho New School Fellowship. The fellowship has provided **nine fellows with paid, one or two-year fellowships**, giving fellows the time and access to expertise to create and execute plans to open high-performing public charter schools.

The Facilities Challenge

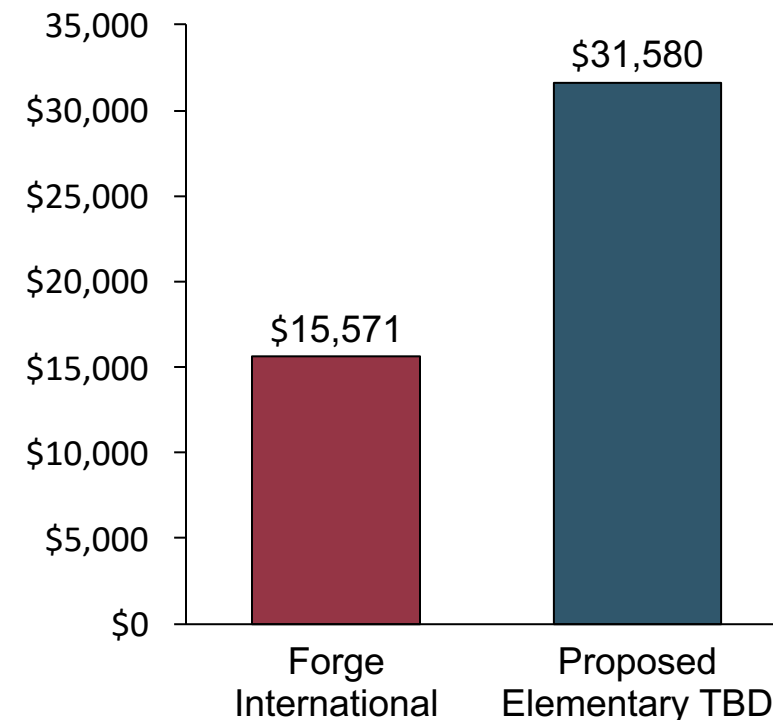
In Idaho, traditional district schools have access to state and local funding streams to finance facilities, amounting to a per pupil *average* of \$1,206. Charter schools have access to just \$445 in state funding for their facilities expenses.

Middleton Example

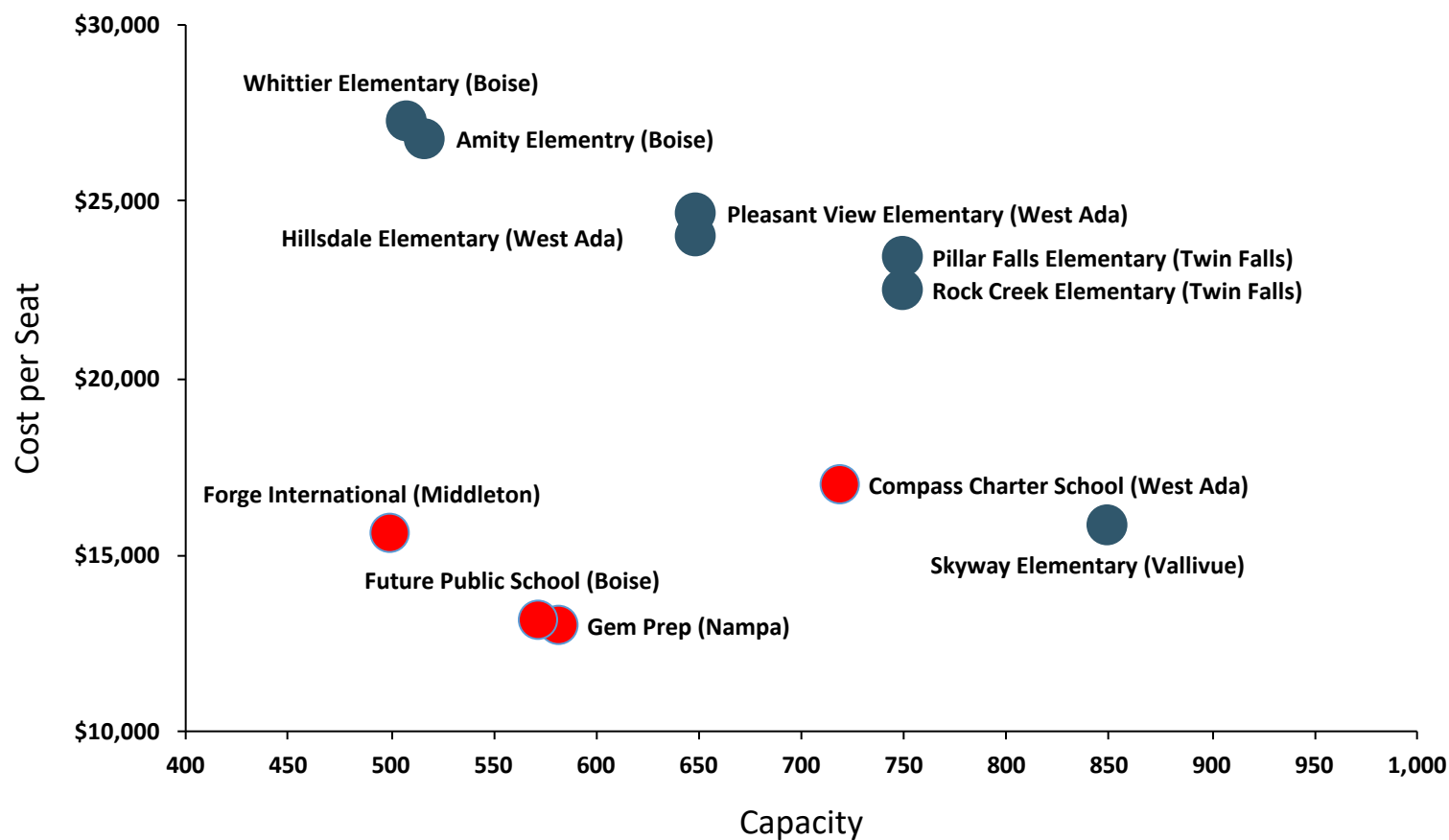
Cost per Square Foot, Middleton New Construction



Cost per Seat, Middleton New Construction



Recent School Construction Comps



Data from Bellwether Education Partners

OVERVIEW OF FEDERAL CSP GRANTS PROGRAM

The CSP Grants to State Entities program is funded under the *Every Student Succeeds Act* (ESSA).

It enables sub-grants to:

- Open and prepare for the operation of new, high-quality **public charter schools**.
- Replicate and expand high-quality public charter schools.



OVERVIEW

Idaho's Consortium

- **Bluum** – project lead and grant recipient.
- **J.A. and Kathryn Albertson Family Foundation** – critical nonprofit funding partner.
- **Idaho State Board of Education** – ultimate state quality control agent.
- **Idaho Public Charter School Commission** – lead authorizer for new and expanded public charter schools.
- **Building Hope** – nationally-recognized facilities finance experts.

The 2018 CSP Competition

- \$400 million in funds with Idaho competing against 15 states: Alabama, Arizona, Arkansas, Delaware, Guam, Indiana, Michigan, New York, Puerto Rico, Colorado, District of Columbia, Iowa, New Hampshire and North Carolina.
- Eight states won: Arizona, Arkansas, Colorado, Idaho, Delaware, Michigan, New York, North Carolina.
- **Idaho received \$17,111,111 over 5-years; \$8,939,900 in the first two years.**



OVERVIEW

Idaho's Grant Rationale

- *Supply of school seats is tight.* Idaho and Nevada were the nation's fastest-growing states between July 2017 and July 2018. Both states' populations increased by about 2.1 percent in the last year alone. – **"Our schools are overcrowded."**
- *Idaho's charter sector is well established, capable of adding students, and high performing.* For over 20 years the number of schools and enrollment have steadily grown, on average adding two to three new schools a year.
- *Public support and demand for charter schools in Idaho is robust* – 3 out of 4 Idahoans favor charter schools described as "public schools that have a lot more control over their own budget, staff and curriculum, and are free from many existing regulations."

Who Supports Idaho's CSP Effort

- Governor Butch Otter
- Senate President Pro Tempore Brent Hill
- House Speaker Scott Bedke
- Senate Education Chair Dean Mortimer
- House Education Chair Julie VanOrden
- Representative Wendy Horman
- Idaho State Board of Education Executive Director Matt Freeman
- Idaho Public Charter School Commission Chairman Alan Reed
- US Senator Mike Crapo
- Congressman Mike Simpson
- Congressman Raul Labrador
- J.A. and Kathryn Albertson Family Foundation Executive Director Roger Quarles
- Idaho Farm Bureau President Bryan Searle
- Building Hope President Joe Bruno
- Public Charter School Leaders across Idaho
- Business and Philanthropic Leader

PERFORMANCE MEASURES

Idaho's 2018 CSP Grant Objectives:

- Increase the number of quality charter school seats by 8,200 students, **especially for our most educationally disadvantaged and rural students**, through start-up, replication and expansion;
- Support the PCSC in expanding its quality authorizing efforts while disseminating and **supporting best practice for other authorizers statewide**; and
- Evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system.



PUTTING NEW GROWTH INTO HISTORICAL CONTEXT

Idaho's Growing Charter School Sector 1998-2019

Year	# of Schools	Enrollment		Year	# of Schools	Enrollment
1998	1	168		2009	31	11,959
1999	2	184		2010	36	14,611
2000	8	915		2011	40	16,048
2001	9	1,083		2012	43	17,808
2002	10	1,478		2013	44	18,782
2003	13	3,058		2014	47	19,367
2004	16	4,767		2015	48	19,700
2005	18	5,975		2016	48	20,340
2006	24	8,003		2017	50	21,351
2007	28	9,543		2018	52	21,872
2008	30	10,768		2019	57	24,004



ELIGIBLE APPLICANTS

- Competitive Grant Process.
- Must have an approved charter petition from a state-sanctioned public charter school authorizer.
- Bluum will fund only high-quality plans.
- Applicants that submit proposals that are high-quality and meet the definitions for new, replication or expansion will be considered after a **rigorous 3rd party peer review process.**



GRANT LOGISTICS

Idaho's \$17,111,111 Application Distribution

- At least 90 percent must be provided in competitive subgrants to eligible applicants.
- At least 7 percent must be utilized for state-level technical assistance activities and program evaluation/research. Three percent of this to the Idaho Public Charter School Commission for technical assistance and new school supports.
- No more than 3 percent for administration.



GRANT LOGISTICS (TENTATIVE)

Four Competitive subgrant competitions

- In May 2019 there were 5 subgrants issued for up to \$800,000 each (Compass, Forge, Future, Gem Prep Meridian, White Pine).
- In October 2019 there will be up to 7 available subgrants for up to \$800,000 each (based on recent roadshow we expect applications from nine to 11 groups).
- In October 2020 there will be up to 5 available subgrants for up to \$825,000.
- In October 2021 there will be up to 2 available subgrants for up to \$837,500.

Total subgrant period is up to 42 months, of which up to 18 months may be designated for planning and up to 24 months for implementation.

Note: Last week, Bluum received supplemental funds to increase the CSP grant award from \$17.1 million to \$22.47 million. This supplemental funding would allow Bluum to issue up to \$1.25 million subgrants for schools serving at least 450 students.

Subgrant allowable activities

- (a) Preparing teachers, school leaders, and specialized instructional support personnel, including through paying costs associated with –
 - (i) Providing professional development; and (ii) Hiring and compensating, during the eligible applicant's planning period specified in the application for funds, one or more of the following: (A) Teachers. (B) School Leaders. (C) Specialized instructional support personnel.
- (b) Acquiring supplies, training, equipment (including technology), and educational materials (including developing and acquiring instructional materials).
- (c) Carrying out necessary renovations to ensure that a new school building complies with applicable statutes and regulations, and minor facilities repairs (excluding construction).
- (d) Providing one-time startup costs associated with providing transportation to students to and from the charter school.
- (e) Carrying out community engagement activities, which may include paying the cost of student and staff recruitment.
- (f) Providing for other appropriate, non-sustained costs related to opening, replicating, or expanding high-quality charter schools when such costs cannot be met from other sources.

GRANT LOGISTICS

Restrictions

- **No construction; funding cannot be used to build buildings.**
- Our application is a “contract” with the USDOE. Bluum will be held accountable for what is written in the grant.
- Funding cannot be redirected for other uses (e.g. traditional public schools that are not charters).
- Virtual charter schools are not eligible to apply.





Questions, comments or concerns



For more information go to:

<https://www.bluum.org/idaho-csp-grant/>