

## **IDAHO ABSTRACT – “COMMUNITIES OF EXCELLENCE”**

Idaho is the nation’s fastest growing state. Our supply of high-performing school seats is tight, and our student demographics are changing rapidly. Idaho’s charter school sector is well-established with over 20-years of work by educators, community groups, parents and students. Gem State charters are high-performing and capable of adding more students. Idaho’s families value public charter schools, staunchly support them and want more of them for their children.

A consortium of partners has come together around Idaho’s **Communities of Excellence** federal CSP proposal to lead the expansion of high-quality charter schools across our state. Bluum, a Boise-based statewide nonprofit charter school support entity, is project lead. Bluum is organized to seek out, vet and support innovative leaders and high-performing school models. Bluum is joined by Idaho’s primary charter school authorizer the Idaho Public Charter School Commission. The Idaho State Board of Education and the J.A. and Kathryn Albertson Family Foundation are long-time leaders in Idaho education and school improvement efforts. Both are key members in Idaho’s consortium. The nationally-renowned non-profit charter school facilities finance group Building Hope is the fifth member of Idaho’s consortium.

Our efforts to launch, replicate and expand charter schools are aligned to standards for best practices. Idaho is well positioned to leap frog the national charter school movement by applying nationally effective practices, as well as supporting novel innovations that are nationally transferable.

To this end, Bluum proposes a 5-year, \$17,111,111 CSP grant that will meet three ambitious objectives that are well-aligned to CSP competitive priorities:

- 1) 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;
- 2) support the PCSC in expanding its quality authorizing efforts while disseminating and supporting best practices for other authorizers statewide; and
- 3) evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system.

**Idaho's Communities of Excellence**  
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## Narrative for Idaho's "Communities of Excellence" Project

The story of Idaho's public charter schools is a story energized by a can-do entrepreneurial spirit. This spirit is driven by individuals who take personal responsibility for the collective good of their communities. Their efforts are the very manifestation of the original intent of charter schools: innovation at the local level inspired by citizens who believe that the public schools properly belong to the public, and that education is the community's responsibility. Waiting for someone else to respond is not their way. For a state its size, Idaho has an extraordinary variety of successful charter schools.

Twenty years after the first charter school opened its doors in 1998, there are now more than 50 charter schools serving about 22,000 students. These schools educate 7% of the state's public school students. If all these students were in one school district it would be the state's third largest. Conservatively, there are over 6,000 students on charter school waitlists.

Idaho's public charter schools are perennially some of the state's highest-performing public schools on state ISAT achievement tests in both English Language Arts (ELA) and mathematics, and on the SAT. As a cohort, Idaho charter school students show more academic growth than their peers in traditional district schools. This holds for economically disadvantaged and minority students (see Table 1).

**Table 1: Charter Students Outperform All Students Statewide (2016-17 ISAT Data<sup>1</sup>)**

	All Students		Economically Disadvantaged		Minority <sup>2</sup>	
	Charter	Statewide	Charter	Statewide	Charter	Statewide
ELA Proficient	63%	53%	51%	41%	53%	37%
Math Proficient	52%	43%	39%	31%	40%	27%
ELA Adequate Growth <sup>3</sup>	74%	65%	64%	57%	65%	54%
Math Adequate Growth	64%	55%	52%	45%	53%	42%

<sup>1</sup> All data come from Idaho State Board of Education

<sup>2</sup> Minority student is defined as Hispanic, American Indian, Asian, Black, More than one race, and Hawaiian/ Pacific Islander

<sup>3</sup> Definition of Met or Exceeded Growth: Are students making adequate growth to achieve proficiency with 3 years or by 10<sup>th</sup> grade?

Most of Idaho's charter schools are authorized by the Idaho Public Charter School Commission (PCSC). The PCSC is the gold standard for authorizing in Idaho. The work of the statewide authorizer is well regarded in Idaho and nationally by such groups as NACSA. CSP funding will offer us intensified support to incubate new entities and improve and expand existing charters (including a growing number of rural charters), and especially Idaho's top performers – with their large waitlists – which are eagerly seeking to replicate or expand.

*Idaho's **Communities of Excellence** Consortium Partners*

Critical to this CSP proposal's objectives, *the nonprofit statewide charter school support entity Bluum is ready to lead a consortium of state partners*. Bluum is organized to seek out, vet and support innovative leaders and high-performing school models. Quality is our focus, because quality is what counts. Bluum is governance neutral. We support public charter schools, district innovation schools and private schools. We support promising models with technical assistance, grant funding, talent recruitment and development, help securing a facility – anything it takes to provide more Idaho children with world-class education.

Key consortium partners, in addition to Bluum, are: the *Idaho Public Charter School Commission*, which will serve as the primary charter school authorizer under this project. The *Idaho State Board of Education*, which is the ultimate oversight agency in Idaho for public education and charter schools. The *J.A. and Kathryn Albertson Family Foundation* (Albertson Foundation), which provides private philanthropic support for Bluum and Idaho's charter school sector more generally. The non-profit school facilities finance group *Building Hope* is the fifth member of Idaho's **Communities of Excellence** consortium (see annual reports at appendix F).

Our efforts to launch, replicate, and expand charter schools are aligned to national standards for best practices. We are not afraid to appropriate great ideas, models, talent, and

concepts from other states. As the nation's fastest growing state, Idaho will take all the help it can get to ensure we are improving school options for our families and children. Idaho is well positioned to leap frog the national charter school movement by both applying nationally effective practices, as well as supporting novel innovations – especially in rural – that are nationally transferable. Idaho innovates. The state has the highest patents per capita and has among the highest number of PhDs per capita. There is talent, energy and opportunity to improve Idaho's public K-12 system. Through CSP support Idaho charters can help show the way.

This proposal seeks to enhance stakeholders' capacity to expand opportunities for students to attend excellent charter schools that meet and exceed state academic standards. Idaho's **Communities of Excellence** project has three objectives: 1) 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; 2) support the PCSC in expanding its quality authorizing efforts while disseminating and supporting best practices for other authorizers statewide; and 3) evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system.

**Competitive Preference Priority 1: At Least One Authorized Public Chartering Agency Other than a Local Educational Agency, or an Appeals Process**

*Idaho's charter school law allows multiple authorizers.* In addition to Local Educational Agencies (school districts), **Idaho code (33-5202A. Definitions)** statutorily allows the following entities to serve as public charter school authorizers: 1) the Idaho Public Charter School Commission; 2) Idaho public colleges, universities, or community colleges; and 3) private, non-profit Idaho-based, nonsectarian colleges or universities that are accredited by the same organization that accredits Idaho public colleges and universities (See ID Code at appendix F).

In 2018, the PCSC authorized 37 of 52 schools (representing about 17,000 of 22,000 charter students statewide). We expect the PCSC to be the primary, if not sole, authorizer of new and expanding schools under this CSP grant proposal. No colleges or universities currently authorize charters.

### **Competitive Preference Priority 2: Equitable Financing**

**Per Idaho Code (33-5208. Public charter school financial support)** *Idaho public charter schools receive equal access to all state and federal dollars afforded traditional public school districts, and do so on the same payment schedule.* State and federal revenue provides the foundation for Idaho public charter school budgets. Idaho is one of seven states that use a resource allocation model and fund school districts and charter schools based on positions (teachers, administrators, and classified staff). Idaho's funding approach also includes distributions, both statutory and non-statutory, for specific programs or purposes. The number of distributions, including operational funds, has increased from 26 distributions in FY2008 to 41 distributions in FY2017. Federal Title dollars are mainly tied to poverty rates, and under state law Idaho charter schools have equal access to these federal resources.

*Payment Schedule.* The state department of education is authorized to make an advanced payment of 25% of a public charter school's estimated annual apportionment for its first year of operation to assist the school with initial start-up costs or payroll obligations. It does so for each year after that as well, provided the charter school is serving more grades or at least 10% more classes than the previous year. Thereafter, public charter schools are funded on the same quarterly payment schedule as all public schools across the state.

Additional funding streams available to charter schools include:

*Special education.* For each student enrolled in charter schools who is entitled to special education services, all state and federal funds from the exceptional child education program for that student stays with the student when they enroll in a charter.

*Alternative school support.* Public charter schools can qualify for alternative school funding. Alternative school funding provides up to 25% more state funding for summer school activities. This is an important revenue stream for school models working to serve some of our most at-risk students.

*Transportation.* State law provides charter schools 60% of their estimated transportation costs, which is the same allocation the state provides public school districts.

However, Idaho's 115 local school districts have authority to levy property taxes for the support of their schools. Such funds are purely discretionary and do not factor into allocations of state funds. School districts located in areas with low property values receive additional state financial assistance for a portion of the cost of annual bond interest and redemption payments through a "Bond Levy Equalization Fund." Zip codes, however, still largely drive school spending in Idaho. There are large inequities across public school districts. For example, property-rich Blaine County school district (Sun Valley) has a total per-pupil funding of over \$19,000, while West Ada (Meridian) school district's per-pupil funding is \$7,600.

Because charter schools lack any taxing authority, they *lack access to local revenue*. So, although state funding for charter schools is allocated in the same manner as that of traditional public school districts, the lack of access to local revenues drives disparities in per student revenue between charter schools and many traditional district schools. On average, public charter schools in Idaho receive about \$1,500 less per pupil than district schools.

The Idaho Public School Funding Interim Committee is studying a switch to a student-based budgeting model that would weight factors like student poverty and English Language Learners. Such a move would benefit Idaho's poorer districts and those public charter schools that serve needier students. Committee Co-chair Representative Wendy Horman told her House colleagues that the committee intends to bring a recommendation to the 2019 legislature.

### **Competitive Preference Priority 3: Charter School Facilities**

*3.a. Funding for facilities: Idaho code (33.5208(5). Facility Funds) provides a state per-pupil facilities allowance.* The funding amount is a percentage of the statewide average amount of bond and plant facility funds levied per student by school districts. To determine the amount of per-pupil facilities funding to provide charter schools, the state calculates the average per-pupil funding from district bonds and levies. Idaho code dictates that charters receive no less than 20% and no more than 50% of this average. The amount for this allocation is \$392 per student for the 2017-18 school year.

Under Idaho law, traditional school districts and charter schools must allocate annually at least 2% of each building's replacement cost to cover maintenance and repairs. The state provides districts and charter schools a proportion of these funds, based on a series of calculations by the state department of education. If the amount determined by this calculation is less than the district's distribution from the state lottery, the state will pay the school or district the difference. Through this School Facilities Maintenance Match program, charter schools received \$12 per student for the 2017-18 school year.

*Charter schools also receive state lottery facility funds.* State statute requires that the state lottery allocate 3/8ths of its revenue to a school building account. The state then distributes these funds to school districts and charter schools on a per-capita basis to offset facilities costs. The per-student payment for the 2017-18 school year is \$64.



In addition, in 2015 the Idaho Charter School Network worked with the legislature to create the *Public Charter School Debt Reserve* – **Idaho code (33.5217. Public charter school debt reserve)**. Traditional financing arrangements require charter schools to set aside cash in a debt reserve fund, in case the school cannot make payments. Eligible charter schools may apply to the Idaho Housing and Finance Association (which oversees the debt reserve program), and if approved, use this debt reserve to help obtain favorable financing. This allows schools to either tie up less cash in the reserve fund or to borrow less – ultimately saving charter schools tens of thousands of dollars over the life of the loan. The legislature has appropriated \$750,000 to the debt reserve. This program applies to charter schools with demonstrated academic financial success over several years.

*3.b. Assistance with facilities acquisition:* Building Hope, a national, nonprofit lender and real estate developer, provides up to 35% of the equity needed to secure bank or bond financing in the state of Idaho by providing non-recourse, low-interest (3%), 5-year loans. These Building Hope loans are subsidized by a \$14 million Program Related Investment (PRI) provided by the Albertson Foundation. The payments are computed based on a 25-year amortization schedule, keeping the annual debt payment low for the first five years. This arrangement allows charter schools adequate time to reduce their loan balances and build up cash reserves. After five years, schools can obtain replacement financing to pay off their initial Building Hope loans.

In 2017, Building Hope launched three Idaho facility projects totaling about \$25 million. In total, about 110,000 square feet of new school space will allow three new charter schools to educate over 1,700 students. Since 2014, Building Hope has led six Idaho public charter schools in developing their architectural plans, identifying appropriate locations, securing project financing, and managing design and construction phases.

#### **Competitive Preference Priority 4: Best Practices to Improve Struggling Schools and LEAs**

The Idaho Legislature, with support from the Idaho Charter School Network, enacted **33-5801. Local Innovation School Act** in 2016. It states “there is hereby established the local innovation school act. Participating schools and districts will evaluate existing laws and administrative rules to receive flexibility from laws and policies that impede local autonomy, allowing them to be agile, innovative, and empowered to adapt to local circumstances.” The law permits a group of teachers with a principal or a superintendent or a school board to launch an innovation school. According to the statute, “innovation schools may be exempted from the following: a) Idaho Code statutes applicable to a school board or school district; b) Rules promulgated or guidelines adopted by the State Board of education or state department of education; and c) Local district policies, including terms and conditions of employment.”

This law gives teachers and school operators full operational autonomy as well as charter-like flexibility. It also helps break down the barriers between charters and school districts. The school teams are allowed to make decisions on everything from curriculum to schedules – and can employ the teachers directly and free of district contracts. Innovation Schools negotiate an agreement with their district that includes performance goals and accountability metrics agreed upon for the innovation school. The Innovation Schools agreement term is three years and includes automatic renewal at the option of the innovation school team if all conditions under the agreement are satisfied. If conditions are not met the agreement can be terminated. The law provides \$10,000 to be used for planning purposes. Innovation Schools need to meet the same state academic standards and graduation requirements as all public schools.

The first Idaho Innovation School – Treasure Valley Leadership Academy (TVLA) – opened in August of 2017 in the high-poverty, high-needs Nampa School District (NSD) with a

class of 40 ninth-graders. Nampa’s demographics include 63% white and 30% Hispanic or Latino students. Sixty-six percent of students qualify for free or reduced lunch (FRL). NSD serves and supports 1,400 special education and 1,000 homeless students. The school plans to grow while adding a grade a year until it is a 4-year 400-student high school. According to Nampa officials: “It is time to try something new. Our students’ needs demand it, their lack of choice sanctifies it, our commitment to technology verifies it, our leadership supports/seeks it, and our partnerships confirm it. We need a successful model that can be replicated in our district and throughout the state. It is time to enact a new design of schooling, one that breaks free from the traditional system and promotes innovation and choice. We feel it is time to open a new innovative high school within NSD that is designed to empower ALL students to own their learning, develop grit, and be future-ready” (see appendix F for TVLA Nampa proposal).

Bluum worked closely with Nampa and TVLA officials to design a \$1 million start-up grant from the Albertson Foundation to support the school’s mastery-based blended learning model. Other Idaho schools and districts are exploring the Innovation School option. As the federal Every Student Succeeds Act (ESSA) requires each state to designate at least 5% of its schools, and high schools with graduation rates below 67%, as low performing, Idaho’s Innovation School act provides another tool for school redesign using charter like flexibilities (see ID Innovation Schools Act at appendix F).

*Using charter lessons to assist rural districts.* Currently in Idaho seven school districts authorize 15 charter schools. The rural Salmon School District, for example, authorizes the 90-student multi-grade Upper Carmen Charter School. The district and charter have collaborated on a blended learning high school that offers students access to advanced STEM courses online. Students spend a portion of their time both in the charter school and the district high school to

utilize the quality course options that work best for them. Upper Carmen co-founder Jim Smith served as the Salmon school district superintendent for 19 years. In retirement he still serves as a consultant to the district on its school improvement efforts. Sue Smith, Upper Carmen's administrator, provides consulting support and technical assistance to the neighboring 66-student (65% of whom are FRL eligible) South Lemhi school district in their K-4 reading curriculum redesign efforts based on Smith's *Bethtommy Read to Read* curriculum.

The Alturas International Academy charter school leader in Idaho Falls, Michelle Ball, has been conducting professional development for elementary school educators from the rural West Side school district in Dayton, Idaho. The Harold B. Lee Elementary School (enrollment 332 students and 50% are FRL eligible) is adopting the teaching and learning model of Alturas. The model works well for smaller rural schools and includes multi-age classrooms, a focus on mastery-based learning, and teachers working together across grades and age levels to ensure a cohesive learning opportunity for all students. The same teachers lead students for multiple grades and years, thus allowing students to grow up with their teachers.

These examples demonstrate in powerful ways how charter schools and rural districts can work together to support children's learning. CSP grant support will enable and encourage more of these kinds of collaborative partnerships.

### **Competitive Preference Priority 5: Serving At-Risk Students**

Idaho has 77 alternative public schools serving about 6,400 students. There are a number of school models serving at-risk students, and several of these are public charter schools. As referenced in **Competitive Preference Priority 2**, Idaho provides *alternative school funding support* to both public charter schools and school districts. Alternative school funding provides up to 25% more state funding for summer school activities.

Under state law, “An alternative school is a school that has been established to provide instructional courses to eligible at-risk youth so they can earn a high school diploma. Alternative schools are required to offer programs clearly designated to serve at-risk students.” Idaho currently has five alternative charter schools. Collectively they educate about 1,000 students (almost one-sixth of all at-risk students statewide). *This is an area in Idaho education that needs improvement, innovation, and more and better options for students.* Charters can lead in this.

*State law provides flexibility for alternative schools* in negotiating differentiated performance targets that “allow the inclusion of additional rigorous, valid, and reliable indicators proposed by the charter holder to augment external evaluations of its performance, provided that the authorized chartering entity approves the quality and rigor of such proposed indicators.” The PCSC, in its performance frameworks used to hold authorized alternative charters accountable, utilizes “alternative indicators” of performance that compare their alternative schools to “proficiency rates in the top 10% of alternative schools statewide.”

Idaho is opening more charter schools aimed at serving at-risk students. In late 2016, the Nampa Public School District authorized the Pathways in Education (PIE) Nampa charter school. Pathways Nampa enrolls 200+ at-risk students in grades 9-12. PIE is a well-established charter management organization with eight schools in four states. Additionally, PIE works with the Ridgevue High School in Idaho’s Vallivue School District on providing a ‘Credit Recovery Class.’ Pathways Nampa received a \$700,000 start-up grant from the Albertson Foundation.

*Creating leaders dedicated to serving at-risk populations.* The Idaho New School Fellowship is managed by Bluum and funded by the Albertson Foundation and the Louis Calder Foundation. The Fellowship targets Idaho’s neediest students by providing school leaders with the advanced leadership training and local expertise needed to plan and launch a successful

charter school. Two of the first four New School Fellows will launch Elevate Academy in Caldwell in August 2019. The fellows, Monica White and Matt Strong, are veteran educators with a combined 40 years of education experience, including as the principal and assistant principal of Caldwell's alternative Canyon Springs High School for the past decade.

White and Strong resigned their positions at the Caldwell School District to launch a career tech charter school for at-risk students. The Caldwell area has a graduation rate of just 77%. In their petition to the PCSC, White and Strong wrote, "Elevate Academy is a Career Technical Education (CTE) school of choice for students 6<sup>th</sup> through 12<sup>th</sup> grade that are considered at-risk under the state of Idaho's at-risk qualifiers." Elevate Academy will operate as a year-round school and expects to enroll 330 students in 2019-20 and grow to 487 students by 2021-22. Through community partnerships and an innovative approach to hiring CTE teachers, Elevate Academy intends to offer multiple CTE industry certifications. They have a technical advisory board that includes a number of business, governmental, and nonprofit organizations.

Expanding and sharing the work of schools for at-risk students like Pathways Nampa and Elevate Academy under the CSP grant will help ensure Idaho *develops and implements best in class recruitment and enrollment policies to promote inclusion of all students, including by eliminating any barriers to enrollment for educationally disadvantaged students (who include foster youth and unaccompanied homeless youth). These models support all students once they are enrolled to promote retention, including by reducing the overuse of discipline practices that remove students from the classroom.* Best practices will be disseminated widely under this grant.

#### **Competitive Preference Priority 6: Best Practices for Charter School Authorizing**

As noted in **Competitive Preference Priority 1**, in Idaho school districts, the state charter school commission and colleges and universities are allowed to authorize public charter schools. We expect, and provide resources under the terms of this grant accordingly, the PCSC to

be the primary authorizer of both new and expanding/replicating schools under this CSP grant. The PCSC is a key partner and quality control mechanism for the work of Idaho's **Communities of Excellence** consortium.

According to NACSA's *State Policy Analysis 2015*, "Idaho modernized its charter school law (in 2013) to put several charter school accountability mechanisms in place, including performance-based contracts. Idaho voluntarily employs strong authorizing practices that mirror those that result from NACSA's recommended policies – enacting them into law will ensure they continue into the future."

The 2013 statutory amendment required PCSC, and district authorizers, to create a performance-based accountability system with a comprehensive performance framework and a detailed performance certificate. Again, the PCSC has taken this work most seriously and has dedicated resources and staff time in developing high-quality certificates, which some school district authorizers are now emulating. According to statute (**33-5205B. Performance certificates**): "the authorized chartering entity and the governing board of the approved public charter school shall execute a performance certificate that clearly sets forth the academic and operational performance expectations and measures by which the public charter school will be judged and the administrative relationship between the authorized chartering entity and public charter school, including each party's rights and duties. The performance expectations and measures set forth in the performance certificate shall include, but not be limited to, applicable federal and state accountability requirements." Each authorized chartering entity must annually publish a public performance report for each of its authorized charter schools, while each individual charter school must also publish its annual report on its website.

*The Idaho State Board of Education is the ultimate oversight agency for authorizers and public charter schools.* Pursuant to Idaho code (**33-5210. Application of school law – Accountability – Exemption from state rules**), “all public charter schools are under the supervision of the State Board of Education. Every authorized chartering entity that approves a charter shall be responsible for ensuring that each public charter school program approved by the authorized chartering entity meets the terms of the charter,” and comply with the general education laws of the state.

*Bluum, as the statewide nonprofit entity for this CSP grant, will sub grant with the PCSC and coordinate closely with the State Board to provide grant resources that promote and expand the quality authorizing work of the PCSC, while also expanding the supports and technical assistance available to new and expanding charter schools.* As improvements and enhancements are made to the efforts of the PCSC to become a national leader in authorizing, Bluum and the PCSC will work to provide technical assistance and training to district authorizers committed to authorizing schools in a fashion that ensures school flexibilities and operational flexibilities, while maintaining quality oversight. Bluum and the PCSC will also share best practices with universities and colleges so that they may better understand the opportunities and responsibilities of becoming a public charter school authorizer.

The PCSC’s performance certificates clearly delineate school and authorizer roles and responsibilities. Performance certificates have become the centerpiece of a strong, performance-driven authorizing program. School districts authorizing charter schools in Idaho build on the expertise of the PCSC, and this grant would facilitate the expansion of this sort of sharing of best practice. PCSC Director Tamara Baysinger is a participant in the 2018 NACSA Leaders



Program, and has become Idaho's go-to expert on quality charter school authorizing. Some districts, in fact, have turned their authorizing responsibilities over to the PCSC in recent years.

The PCSC provides *annual student performance data* of its authorized schools in both its summative Annual Report (see appendix F), and its *individual school performance reports* (see appendix F). This information is available on the PCSC website. The PCSC's school performance reports serve several stated purposes:

1. To provide transparent, data-drive information about charter school quality;
2. To ensure charter school boards have access to clear expectations and are provided maximum opportunity to correct any deficiencies prior to their renewal year; and
3. To inform mid-term authorizing decisions, such as the evaluation of charter amendments.

*The PCSC performance reports clearly set forth the academic and operational performance indicators, measures, and metrics that guide the PCSC evaluations of schools.* The reports contain indicators, measures, and metrics for student academic proficiency, student academic growth, post-secondary readiness (graduation rates), and board performance and stewardship. The performance framework requires, at a minimum, that each school meet applicable federal, state, and authorizer targets and standards for student achievement.

Each school's Annual Performance Report provides information on their *student support services*. These services are unique to each school, but include items such as: a) providing students with opportunities to enroll in courses for concurrent college credits; b) offering opportunities for students to develop professional work skills through in-school and community-based service and apprenticeships; and c) opportunities to take Advanced Placement courses.

In addition to the public information provided by the PCSC through its website, the Idaho Charter School Network provides school level information and links to the state's charter schools

and their student support services. Bluum also publishes a *Parents' Guide to Idaho's School and Learning Choices* that is available in English and Spanish in hardcopy and online (see appendix F). Finally, *Idaho Education News* has on its website a section called "IdahoED Trends," which allows parents to acquire and compare performance, funding, and programmatic data and information across all public charter and district schools.

Idaho law is silent *on parent contract requirements*. Very few, if any, Idaho charter schools have parent contract requirements. All charter schools have, however, parent handbooks that include information on expected student behavior and actions the schools can take for things like truancy, bullying other children, etc. Idaho's public schools, including charters, are *prevented by recent court decisions from charging fees for courses*, but schools can charge for items such as school supplies, binders, and backpacks.

*Enrollment criteria.* A charter school is a public school that must as a condition of its charter have an open enrollment policy. Idaho charter schools have a cap or limit as to the number of students they can accept. If the number of applications to a charter school exceeds the capacity of the school, all applicants will have an equal chance of being admitted through a random selection process or lottery. The lottery is conducted in the spring before the next school year and the charter school governing board is required to hold the lottery in a public space.

There are certain preferences that must be applied before the lottery is conducted. For example, Idaho Statute allows a charter school to give enrollment preference to children of founders, provided that this preference does not exceed 10% of all students enrolled. Those students that were not chosen to attend the charter by the lottery process are placed on a waiting list. There is a separate list for siblings of an enrolled charter student. Once a space becomes available, the charter school will contact the first name on the waiting list to fill the empty spot.

Under Idaho code *all public charter schools must undergo annual, timely, and independent audits of their financial statements* based on generally accepted accounting principles. School audits are filed with authorizers and must be posted on individual school websites. The PCSC reviews schools' near-term financial health and long-term viability. The PCSC's *2017 Annual Report* states: "most PCSC portfolio schools demonstrated operational and fiscal strength. When weak areas did appear, they tended to be in the areas of late reporting and independent financial audit findings. A small minority of schools evidenced fiscal distress. In these cases, the PCSC has taken steps to protect taxpayer resources while allowing the schools every opportunity to regain stability." Since 1998, Idaho has closed nine public charter schools.

*A charter may be revoked by the authorized chartering entity* if the public charter school has failed to meet any of the specific, written conditions for necessary improvement. According to statute, "Revocation may not occur until the charter holder has been afforded a public hearing, unless authorized chartering entity determines that the continued operation of the public charter school presents an imminent public safety issue, in which case the charter may be revoked immediately." A decision to revoke or non-renew a charter or to deny a revision to the charter may be appealed directly to the State Board of Education.

*School Closure Protocols:* Idaho statute provides clear guidance to assist students enrolled in a charter school that closes or loses its charter to attend other high-quality public schools. Per Idaho Code (**33.5212. School Closure and dissolution**) – prior to any public charter school closure decision, an authorized chartering entity shall have developed a public charter school closure protocol to ensure timely notification to parents, orderly transition of students and student records to new schools....In the event of a public charter school closure for any reason, the authorized chartering entity shall oversee and work with the closing school to ensure a

smooth and orderly closure and transition for students and parents, as guided by the closure protocol.” The PCSC *School Closure Protocol* states: “Whenever possible, the authorizer and public charter school should work together to ensure that the school is able to operate through the completion of the regularly scheduled school year. Under most circumstances, this should allow adequate time to complete all closure tasks. *More importantly, it minimizes instructional gaps for students. However, there are occasions when it is necessary for a school to close mid-year. In these cases, students’ educational transitions should be the highest priority.*” (See appendix F for PCSC school closure policy.)

## **SELECTION CRITERIA**

### **a) Quality of Project Design**

1) The *rationale for this proposed project is threefold:*

A) *Supply of school seats is tight.* Idaho is growing rapidly and needs to build more schools to meet the needs of our expanding and diversifying student population. From July 2016 to July 2017, according to the U.S. Census Bureau, Idaho grew faster than any other state. According to the National Center for Education Statistics, from 2013 to 2025 Idaho will see a 17% increase in total pre-K enrollment with 50,000 additional students expected. Charter schools serve as something of a safety valve for growing districts like West Ada in Meridian, Vallivue, or Idaho Falls. All face overenrolled buildings and burgeoning class sizes. The Meridian Southern Rim Coalition, an ad hoc group that advocates for thoughtfully managed planning and development in Meridian, simply states, “Our schools are overcrowded.”

In Idaho Falls School District, Superintendent Chuck Shackett captured the challenge when he told the *Idaho Education News* in late 2016, “the number of enrolled kindergarteners this year exceeded the number of high school graduates last year – by about 200 kids....And that’s not counting all the housing developments sprouting up across Ammon every month.”

Idaho's student population is not only growing but is becoming more diverse. According to the 4<sup>th</sup> edition of the *Idaho Hispanic Profile Data Book*, Hispanics accounted for "42% of K-12 public school enrollment growth between the 2010-11 and 2015-16 school years."

B) *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, adding on average two to three new schools every year (see table 2).

**Table 2: Idaho's Growing Charter School Sector 1998-2018**

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	1083		2012	43	17,808
2002	10	1478		2013	44	18,782
2003	13	3058		2014	47	19,367
2004	16	4767		2015	48	19,700
2005	18	5975		2016	48	20,340
2006	24	8003		2017	50	21,351
2007	28	9543		2018	52	21,872
2008	30	10,768				

Only half of Idaho's 300,000 K-12 public school students are proficient in English Language Arts (ELA), and just 4 in 10 students are proficient in math. Idaho's public charter schools are some of the state's top performers. As a cohort, Idaho charter school students outperform their district peers in math and ELA, both in terms of proficiency and in student growth, and across student subgroups (see Table 1 above). On the 2016-17 SAT, 7 of Idaho's 10 top-scoring high schools were charters (see Table 3).

**Table 3: Percentage of Students by School Meeting both SAT Benchmarks (2016-17)**

School	% of Students meeting both Math and Reading Benchmarks
<b>Meridian Technical Charter High School</b>	<b>78%</b>
Renaissance High School	71%
<b>North Star Charter School</b>	<b>70%</b>
<b>Meridian Medical Arts Charter High School</b>	<b>70%</b>
Boise High School	63%
Midvale Senior High School	60%
<b>Thomas Jefferson Charter High School</b>	<b>60%</b>
<b>Xavier Charter High School</b>	<b>59%</b>
<b>Liberty Charter High School</b>	<b>57%</b>
<b>Sage International Charter School</b>	<b>57%</b>

C) *Public support and demand for charter schools is robust.* Idaho families value charter schools and staunchly support them. *Idaho Education News* sponsored a study entitled *The People’s Perspective: 2017 Survey* (see appendix F), based upon a random survey of 1,004 Gem State residents. What follows are findings drawn from that study.

Charter schools are not a mystery. Instead, they are an increasingly recognized – and valued – public school option. Fully 68% of Idahoans say there is a charter school in their area; 16% of parents have had their children attend charter schools. And support for charter schools is overwhelming – 73% of Idahoans favor them; only 24% are opposed.

But there’s more to Idaho’s support of charter schools than the recognition that they deliver. We believe that a commitment to equity is also a strong driver of public support: Fully 92% agree that “It is our fundamental responsibility as a society to provide a free, high-quality education to all children regardless of their families’ background or economic status.”

So we have important work to do when it comes to making sure quality charter schools reach low-income communities and rural residents. When charter schools are there, rural residents recognize the difference in quality – 58% say their charter school is better than the

regular public schools. Yet only 54% of rural residents can point to a charter school in their area. (In contrast, fully 86% of suburban residents can do so.) Idaho needs to bridge that gap.

<b>2) Project goals, objectives, and outcomes</b>
<b>The purpose of federal CSP grant is to enable a state-wide charter entity to:</b>
a) Award sub grants to eligible applicants to open new, replicate, or expand high-quality charter schools.
b) Provide technical assistance to eligible applicants and authorizing agencies.
c) Improve authorizing quality, including developing capacity for, and conducting, fiscal oversight and auditing of charter schools.
<b>Idaho's rationale as described in subsection a:</b>
a) Supply of high quality school seats is tight
b) Well-established and growing charter sector in Idaho
c) Strong public support for charter schools
<b>OBJECTIVE 1:</b> 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. <b>SMART GOAL STATEMENT 1.1:</b> Based on rationale 2 and 3, awarded grant monies will grow number of charter school seats in Idaho, from about 22,000 to over 30,000, (by 8,200 students) over five years. <b>SMART GOAL STATEMENT 1.2</b> Sub grantee charter school demographics as a whole will be not less than 5% of state averages for non-white, ELL, special needs, and economically disadvantaged students.
<b>OBJECTIVE 2:</b> Support and expand the PCSC's standing as a leader in authorizing quality while disseminating and supporting best practices for other authorizers statewide. <b>SMART GOAL STATEMENT 2.1:</b> Increased % of charter schools in authorizers' portfolios identified as quality and/or improving based on <i>Authorizer Evaluation Report</i> 2019 (baseline) to 2024 (final report).
<b>OBJECTIVE 3:</b> Evaluate and disseminate widely successes and lessons to impact larger education system. <b>SMART GOAL STATEMENT 3.1</b> Increased academic outcomes for students attending Idaho charter schools as determined by meeting or exceeding the achievement growth targets set by Idaho's ESSA plan (see Subsection (d)1 & indicators 1 and 2) <b>SMART GOAL STATEMENT 3.2</b> Increased academic outcomes for all Idaho students as determined by meeting or exceeding the achievement growth targets set by Idaho's ESSA plan (see Subsection (d)1 & indicators 1 and 2)

## b) Objectives

Idaho's **Community of Excellence** proposal has *three primary objectives*:

- 1) *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.*

The first objective is the most important objective as it is about creating new high-performing public charter school seats for Idaho's children, especially our most disadvantaged. Over 20 years Idaho has been growing a high-performing charter school sector that now educates over 20,000 K-12 students in 52 schools. As the nation's fastest growing state Idaho is primed to continue opening and expanding charter schools. CSP grant dollars will help ensure that these new charter school seats have the resources and technical expertise needed to be both high quality and innovative. Idaho's consortium of partners, led by the nonprofit statewide charter support organization Bluum, has demonstrated it knows how to launch and grow great schools.

**Activity (b)1.1:** *Implement sub grant program:* Award through a competitive RFP process up to 19 sub grants over five years to: a) high-quality charter schools for start-up, expansion, and replication efforts; b) incubate and grow innovative school models, especially those that work well for educationally disadvantaged and rural students; and c) support traditional public schools that may want to utilize charter opportunities in their school districts. Nine of these sub grants will be for start-up charter schools creating 4,000 new seats, five will be for charter school expansion creating 1,700 new seats, and five will be for charter school replication creating 2,500 new seats.

**Activity (b)1.2:** *Recruit and develop high-quality charter school pipelines:* Bluum, with grant support from the Albertson Foundation, the Louis Calder Foundation, and the Larry and Marianne Williams Foundation, has created the Idaho New School



Fellowship. This talent pipeline is a partnership with groups like Teach For America Idaho, the Hillsdale College Barney Charter School Initiative, and the KIPP Fisher Fellowship to recruit, train, and support top school leaders in opening or expanding new Idaho charters. Since 2016, six New School Fellows have been recruited and are in various phases of opening schools. Further, to meet the back-office needs of new schools, Bluum launched the Idaho School Finance Fellowship. The first fellow, Kurt Kargou, recruited from New Schools Baton Rouge, started in Idaho in April 2018. This talent pipeline is set to expand under the federal CSP grant.

In addition to recruiting and developing talent, Bluum has worked closely with top-performing charter schools in Idaho to assist in their expansion and/or replication (see Table 4 under Subsection c). This is an ongoing process, but it has already resulted in the creation of more than 4,000 promised new seats. Idaho's first home-grown charter management organization (CMO) Gem Prep emerged from this early work. Gem has received grant support for its three new schools in Idaho from the Albertson Foundation, from the Charter School Growth Fund, and from New Schools Venture Fund. Gem is positioned to expand in future years. Bluum also worked to recruit the first out-of-state CMO to Idaho in Pathways for Education, which now operates a school for at-risk youth in Nampa. Idaho's highest-quality charter schools are primed to grow, and the federal CSP grant will help enable this smart growth.

As noted in Subsection (c), the Idaho consortium is committed to helping community and parent groups start outstanding charter schools. A recent example is the Alturas International Academy in Idaho Falls that opened as a K-8 in 2016 and already has a waitlist of over 400 students. Its leadership and board are now looking to open a

high school. Other community groups are working with Bluum and the PCSC to launch start-up schools. These include efforts in rural Fruitland and McCall. Again, the federal CSP grant will assist in this quality growth and enable Idaho to provide even more technical assistance and support to community groups looking to open schools.

**Activity (b)1.3:** *Provide high-quality technical assistance to aspiring applicants:*

Bluum, in partnership with the PCSC, state agencies, and district partners such as the Nampa Public School District, has worked to assist 10 schools in Idaho to open and/or expand since 2013. There are several others now in the pipeline. Much expertise has been developed around providing pre-opening training and technical assistance to new schools and expanding schools alike. For example, in April 2018, Bluum coordinated a workshop for new schools (to be opened by Idaho New School Fellows and their boards in August 2018 or August 2019) entitled *Responsibilities & Obligations of Charter School Boards* (see appendix F). This training was led by Bluum staff, PCSC staff, and longtime charter school attorney Chris Yorgason.

Idaho's working consortium of partners includes expertise in charter school authorizing (PCSC and State Board), in charter school finance and operations (Bluum and Building Hope), in facilities development and financing (Building Hope), in school leader recruitment and development (Bluum), in grant-making and grant management (Albertson Foundation and Bluum), in governance (PCSC and Bluum), in vetting educational models (PCSC, State Board, and Bluum), and in public policy and charter law (PCSC, State Board, Idaho Charter School Network, and National Alliance for Public Charter Schools). We also have access to, and have worked with, partners such as NACSA, the Charter School Growth Fund, Bellwether, Public Impact, New Schools

Venture Fund, Education Cities, and KIPP Fisher Fellowship, among others.

Collectively, we will channel local energy and inspiration for better school options with the expertise and support necessary for successful charter schools.

Supports provided will be focused on what we already do well – capacity building, new school incubation, talent recruitment, facilities development and financing, coordinating student transportation, financial management and back-office operations, governance recruitment and training, evidence-based instructional practices as defined by ESSA, special education, student retention strategies, English Language Learners, pre-opening activities, and, if needed, school closure guidance and support.

- 2) *Support and expand the PCSC's standing as a leader in authorizing quality while disseminating and supporting best practices for other authorizers statewide.* Bluum and its Idaho consortium partners believe that fostering a high-performing charter sector begins with quality authorizing. Quality authorizing can serve as a quality control check for the charter school sector and provide policy makers, lawmakers, and taxpayers with the confidence that someone is watching the store and ensuring excellence.

According to NACSA's 2016 *State Policy Analysis*, Idaho ranks 20 out of 44 states in quality authorizing policies. NACSA notes, "In practice, the Idaho Public Charter School Commission employs many best practices in charter school authorizing. Codifying this expectation for all authorizers will ensure consistent high quality across the authorizing sector." The proposed activities under Idaho's **Communities of Excellence** will support the PCSC's ambition to become a national leader in authorizing quality while encouraging weak district authorizers to improve or get out of the authorizing business. PCSC best practices will be shared with those districts and higher

education institutions that embrace quality authorizing. NACSA's score for Idaho moved up in 2016 as the state legislature, with support from the Idaho Charter School Network, passed legislation that allows single charter school boards to hold multiple charters.

**Activity (b)2.1:** *Award sub grant support to the PCSC to strengthen and expand its efforts as Idaho's primary public charter school authorizer in order to ensure capacity to support the quality charter school expansion proposed under this CSP grant proposal.* NACSA's *Authorizer Evaluation Report* for the PCSC observed: "The authorizer, despite limited resources, deploys resources effectively and efficiently toward achieving its mission and high-quality authorizing practices; however, many critical functions of authorizing are currently under-resourced." Under **Communities of Excellence**, the PCSC would use technical assistance dollars to incorporate a portfolio and performance management software (something like Epicenter from the National Charter Schools Institute) that would automate and streamline most mandated compliance requirements.

**Activity (b)2.2:** *Use CSP technical assistance dollars to have NACSA (or some other nationally recognized charter authorizing expert) visit Idaho and issue an updated Authorizer Evaluation Report for the PCSC.* Idaho has made legislative progress since 2014, while the PCSC has made many improvements to its policies and operations based on the earlier recommendations and lessons from the field. A 2019 evaluation would set the baseline for improvements to state policies, to the work of the PCSC, and to offer recommendations for improving and expanding PCSC/school district authorizer collaboration. In the fifth year of this grant, national experts on charter school authorizing would be invited back to issue a report summarizing the authorizer work

carried out under this grant, to share lessons learned, and to provide guidance for Idaho in moving quality authorizing forward in the mid-2020s and beyond.

**Activity (b)2.3:** *Coordinate annual charter school authorizing workshops for district authorizers and interested colleges and universities.* These workshops, over the first four years of this grant, will provide technical assistance and facilitate the sharing of challenges/best practices in critical practice areas such as financial oversight, Special Education & English Language Learner rights, enrollment recruitment compliance, discipline policies, and coordinating transportation.

- 3) *Evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system.*

**Activity (b)3.1:** *Track, analyze, and report student ISAT achievement and student growth data to evaluate the impact of charter schools on student achievement, families, and communities.* Share best practices between charter schools and traditional public schools. Idaho's accountability system includes a student engagement survey, and schools administer this survey annually to students in grades 3-8. Bluum will identify, contract, and coordinate with an outside analyst to issue a report on the performance and progress of charter schools under the **Communities of Excellence** program in 2019, 2021, and 2023. Bluum is experienced in sharing rigorous and robust information on charter school performance and lessons learned. Education Northwest has generated two such reports for Bluum in recent years (see appendix F).

Idaho's charters are geographically varied and they utilize a host of diverse and innovative practices and models. As such, the state is an excellent testing ground for exploring how high-quality public school options are having an impact on student

achievement under the new evidence-based definitions of ESSA. Bluum will synchronize with consortium partners the sharing of information and research through collective networks and communication channels in both Idaho and across the country. We will generate summaries and key takeaways for publication by outside groups such as *Idaho Education News* and national outlets. Bluum has had pieces published on rural charter schools in *The 74*, *Brookings Brown Center Chalkboard*, and the *National Charter School Resource Center* (see appendix F). Bluum is leading a session at the National Alliance for Public Charter Schools' 2018 national conference on "Rural Charter Schools and Their Significance in American Politics." Building on this work we will disseminate widely the lessons learned from Idaho's **Communities of Excellence** project.

**Activity (b)3.2:** *Engage parents and community leaders throughout this project (see Subsection f).* It is through genuine opportunities for collaboration that we ensure parental and community buy-in and ongoing support for their children's public charter schools. Building on work already organized in Idaho by Bluum we envision three phases to this project:

- 1) Qualitative research: conduct three series of focus groups in 2019, 2021, and 2023 with parents in charter communities; conduct interviews with local leaders in charter communities; and conduct focus groups with teachers in charters.
- 2) Quantitative research: building on *Idaho's ESSA approved Satisfaction and Engagement survey*, summarize and conduct as needed surveys of charter school parents, teachers, and students in the upper grades.

- 3) Engagement: in-depth briefings and discussions of the survey results with charter and consortium leaders; town-hall style discussions of the results with parents and key stakeholders at the community level in 2019, 2021, and 2023.

**c) Quality of Subgrant Applicant**

*Charter School Quality – Building on Lessons Learned.* The statewide nonprofit charter support organization Bluum was launched in 2013 by the Albertson Foundation. Its mission is to facilitate the start-up, replication, and expansion of public charter schools across Idaho communities that need and want new school options for their children. Under Bluum’s guidance, with Albertson’s direct grant support, and through the authorization of PCSC and the Nampa School District, Bluum has supported four charter school expansions, two charter replications, and two charter start-ups. Table 4 provides a summary of funded schools.

**Table 4: Idaho Charter Schools Supported through “20 in 10” (2014-17)**

School	Location	Albertson Grant Amount	New Seats	Authorizer
North Idaho STEM	Rathdrum	\$450,000	372	PCSC
Sage International	Boise	\$750,000	530	PCSC
Upper Carmen Charter	Salmon	\$123,015	45	Salmon SD
Compass Charter School	Meridian	\$1,093,220	478	PCSC
Gem Prep Pocatello	Pocatello	\$1,390,200	582	PCSC
Gem Prep Meridian	Meridian	\$1,295,200	582	PCSC
Gem Prep Nampa	Nampa	\$1,916,100	582	Nampa SD
Idaho Arts Charter	Nampa	\$1,546,230	582	Nampa SD
Alturas International	Idaho Falls	\$1,000,000	538	PCSC
Pathways in Education	Nampa	\$775,000	300	Nampa SD
<b>Totals:</b>		<b>\$10,338,965</b>	<b>4,591</b>	

Further, there are three start-up schools slated for 2018-19 and 2019-20, a charter replication for 2019-20, and a charter expansion for 2019-20. As a cohort, these schools have also received an additional \$1.7 million in total grant support from the Charter School Growth Fund, Louis Calder Foundation, New Schools Venture Fund, and 4.0 schools. Some of these

schools have worked with the nonprofit Building Hope to construct \$50 million in new or renovated school buildings in Pocatello, Nampa, Meridian, Boise, and Idaho Falls.

These early new school investments are delivering results. While Idaho’s public charter schools are perennially some of the state’s highest-performing public schools on standardized tests, Bluum-supported schools do even better across all measures and subgroups (see Table 5).

**Table 5: Bluum-Supported Charters Outperform Other Charters (2016-17 ISAT Data<sup>4</sup>)**

	Charter Students		Economically Disadvantaged		Minority <sup>5</sup>	
	Bluum	All	Bluum	All Charters	Bluum	All Charters
ELA Proficient	68%	63%	59%	51%	60%	53%
Math Proficient	59%	52%	47%	39%	51%	40%
ELA Adequate Growth <sup>6</sup>	78%	74%	72%	64%	69%	65%
Math Adequate Growth	67%	64%	58%	52%	61%	53%

The work to grow Idaho’s charter school sector builds on lessons learned from across the country and from Idaho’s 20 years of charter school experience. The seven lessons that we will apply to the design of the **Communities of Excellence** project include:

- 1) *A committed board of trustees* that own the charter school process, demonstrate responsibility for the school’s success or failure, and understand their roles and responsibilities vis-à-vis that of the school management and leadership team.
- 2) *Quality instructional leader(s)* who are either experienced and proven in running a high-performing school and/or has received first-class charter specific training.
- 3) *Demonstrated ability to attract, recruit, retain, and develop top talent.* Does the school leadership have access to higher education partners, teacher talent pipelines like Teach For America, and/or other sources of talent acquisition?

<sup>4</sup> All data come from Idaho State Board of Education

<sup>5</sup> Minority student is defined as Hispanic, American Indian, Asian, Black, More than one race, and Hawaiian/ Pacific Islander

<sup>6</sup> Definition of Met or Exceeded Growth: Are students making adequate growth to achieve proficiency with 3 years or by 10<sup>th</sup> grade?



- 4) *Sustainable business plan* that includes appropriate start-up dollars. (Experience from current new school development in Idaho suggests it takes somewhere between \$700,000 and \$1.5 million to launch a successful start-up charter school depending on school size, location, student population, and academic model.)
- 5) *Well-conceived facility plan*. After talent, the toughest new school challenge to overcome are facilities – finding appropriate and affordable properties, managing the financing, and negotiating deals that work for cash-strapped charters. Building Hope is a key consortium partner in assisting schools in their facility challenges. Others, like BaumaUSA, are also now working in Idaho to help schools find cost-effective facility options. In Idaho, schools that spend more than 18% of their annual budget on facility costs have a markedly higher risk of low performance and/or failure.
- 6) *Market demand* and demonstrable need for the school. Charter school funding and long-term viability is dependent on student enrollment. Successful public charter schools know their market and develop loyal clientele.
- 7) *Innovative and effective learning models* that will meet the needs of educationally disadvantaged and/or rural students. Idaho's top charter schools have well-defined academic models. These range from Core Knowledge and Classical Education to STEM and arts-based education to Montessori and Expeditionary Learning. Idaho's charters include alternative schools and others focused on underserved or at-risk populations. Successful charters have a well-articulated academic model and culture with clearly stated goals, a strong educational vision, and sound assessment practices.

These seven lessons are the components – along with federal requirements for reporting, accounting, and serving students with special needs – that Bluum will ask eligible sub grantees to describe, demonstrate, and commit to in their applications for CSP sub grants.

Idaho's charter school sector is far reaching with schools operating in 16 of 44 counties. In 2019 it will expand to 17 of 44 counties. Twelve Idaho charter schools are rural. The cultural and demographic diversity of these sites is broad ranging from Upper Carmen Charter School in rural Salmon to the high-achieving Coeur d' Alene Charter Academy. The student population ranges from all Native American in Fort Hall, to majority Hispanic students at Heritage Community Charter School in Caldwell, to older students who have struggled in traditional schools at Pathways in Education charter school in Nampa.

*Program Announcement and Peer Review Process:* Bluum will work with consortium partners and media like *Idaho Education News* to ensure that the opportunity and application process are broadly advertised. We will announce the CSP funding opportunity through the Bluum website, coordinate with the PCSC and the State Board of Education to announce the opportunity through their networks, and seek to announce the opportunity through partner organizations such as the Albertson Foundation, Building Hope, Teach For America Idaho, Charter School Growth Fund, and the New Schools Venture Fund. We will purchase advertisements in local newspapers to ensure this opportunity is made known to our rural communities that are not as connected to nonprofit, philanthropic, and public school networks.

In addition to posting all information, trainings, and tools relevant to the CSP sub grant application on Bluum's, the PCSC's, and other consortium partners' websites, all district authorizers, charter school developers, and charter support networks will receive direct notification of this funding opportunity through direct mailing. In coordination with consortium

partners, we will conduct three in-person introductory Charter School Grant workshops annually across the state (in Boise, Idaho Falls, and northern Idaho) to announce the CSP grant, to explain how to apply, and to answer questions. Further, we will run two statewide webinars annually on the CSP grant opportunity. This activity will take place in autumn 2018, 2019, 2020, and 2021.

Once an eligible applicant has received the above technical assistance and been notified of approval of its charter school petition from an Idaho authorizer, the school may request the application for a CSP sub grant from Bluum. Idaho's rigorous RFP (application) and Peer Review process for selecting exemplary applicants for CSP funding will constitute an important step in identifying quality eligible applicants that have the capacity to meet our objective of serving more students, especially disadvantaged and rural students. In order to demonstrate its ability to create a high-quality charter school, the eligible applicant will submit its approved charter petition and will provide any supplemental information necessary to demonstrate completion of the requirements outlined in Bluum's application process (RFP).

Bluum will build on the application and review processes constructed for the new school grant-making done with the Albertson Foundation over recent years (see appendix F for draft application [RFP] and review matrix). To ensure sub grants are awarded to the most capable applicants, each proposal for a CSP sub grant will be reviewed by an external Peer Review panel (selected through an application process). The *Idaho Independent Peer Review Panel* will be comprised of teams of two reviewers. These reviewers will receive training on the effective use of a Peer Review Rubric to rate potential sub grant proposals. Individuals selected as peer reviewers must be well informed regarding education, education policy, evaluation, and operations of public charter schools. Utilizing our state and national networks we expect a diverse group of reviewers, comprised of charter school founders and operators; charter

management organization leaders; educators with expertise in special education, English learners, early childhood, and/or rural issues; program evaluators; and public policy professionals knowledgeable about ESSA, education reform, or charter and education policy.

Each selected reviewer must sign an assurance regarding conflict of interest to ensure that all applications are reviewed in a bias-free manner. Reviewers will be required to recuse themselves from the evaluation of any application for which they have a perceived or real conflict of interest.

Using criteria listed within the sub grant rubric (and included in the application) review teams will look for measures, document, and rate: a) quality of board governance; b) quality of instructional leader; c) ability to attract, recruit, retain, and develop top talent; d) a sustainable business plan; e) a well-conceived facility plan; f) evidence of market demand; and g) an innovative and effective learning model that will meet the needs of educationally disadvantaged and/or rural students. Sub grant applications, which will inform sub grant contracts, will include:

- Signed assurances that the charter school developer, staff, and management organizations will fully comply with the stated activities within the sub grant and employ appropriate internal controls to manage the grant;
- Demonstration of the charter staff, board, educational or charter management organization, and authorizer capacity to implement the charter school's proposal;
- Alignment of funded activities with the approved charter petition;
- Stated long-term goals and interim benchmarks, developed on no less than an annual basis, to measure the school's progress in growing enrollment, serving educationally disadvantaged and/or rural students, and academic performance;

- Consultation and communication with parents, community, and staff regarding the planning and implementation of the grant;
- Clear description of the internal controls that explain how expenditures are approved, including the role of management and board;
- Clear transportation plans that best meet their students' needs, so as to ensure that students have access to school. As noted in **Competitive Preference Priority 2**, Idaho covers 60% of a school's transportation costs.
- Demonstration of compliance with Open Meetings and Open Records Law.
- Demonstration of fiscal compliance with Uniform Grants Guidance to determine long-term sustainability and that sound fiscal practices are in place upon inception;
- Explicit budgets that demonstrate long-term sustainability after the project funds expire.

**Table 6: Tentative Timeline for RFP (sub grant application and Peer Review Process)**

Date	Federal CSP Sub Grant Activity
September 10, 2018	Release of RFP for CSP proposals
September 10, 2018	Charter School Training (statewide), introductory technical assistance webinar
September 12, 2018	Issue call for reviewers
September 17, 2018	Charter School Training (Boise), technical assistance grant session
September 19, 2018	Charter School Training (Idaho Falls), technical assistance grant session
September 21, 2018	Charter School Training (Coeur d' Alene), technical assistance grant session
September 24, 2018	Charter School Training (statewide), introductory technical assistance webinar
September 26, 2018	Charter School Authorizer workshop
October 10, 2018	Application to serve as peer reviewer due
October 29, 2018	Finalize Reviewers
November 5, 2018	Peer Review Training, start of peer review period
November 19, 2018	Notification of initial awards
July 1, 2019	Financial end report and annual performance report due
August 1, 2019	Notification of continuation awards, release of request for CSP proposals
September 2019	Start cycle all over

The Idaho **Communities of Excellence** grant is competitive; therefore, high scores from Peer Reviews increase an application's likelihood of approval and receipt of funding at the requested levels. Bluum staff, in consultation with authorizers, will conduct the final review of

all applications to ensure that applications comply with all requirements, and will determine the final budget for each sub grant recipient after determining whether proposed activities are reasonable, allocable, and necessary. Additionally, applications that address secondary education serving educationally disadvantaged and rural students will receive preference points when applications are scored.

The Idaho consortium led by Bluum understands that the purpose of the CSP grant is to provide financial support for the initial operations of an expanding or newly established charter school. Sub grants can only be used for costs associated with expanding, replicating, or opening a public charter school. Sub grant activities refer to only those activities that occur during: a) the 0-year development of a school or school expansion cohort; b) first-year operations of a new school; or c) second-year operations of a new school or school expansion cohort. Grant expenditures are limited to 24 continuous months.

The Federal Register specifies the allowable expenses that may be funded through a federal CSP sub grant.

<b>Allowable expenses include one or more of the following:</b>
(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.

The expense coding guidance provided to sub grantees by Bluum will clearly define allowable and unallowable expenses (i.e., food and drink, management fees, professional dues and membership fees, etc.), list expected accounting policies and procedures, and require schools to comply with all state and federal financial reporting requirements.

*Idaho's Statutorily-Provided Quality Control Mechanisms:* For purposes of this application, Idaho's consortium uses the definition of *high quality* cited in the Federal Register. Idaho's charter schools are held accountable under state code (**33.5209A. Accountability**), and through their performance certificates with authorizers. With support from the Idaho State Board of Education, PCSC, and the Idaho Charter School Network, Idaho code was updated and streamlined in 2017 to read: "*The performance framework shall include indicators, measures, and metrics for, at a minimum:*

*a) Student academic proficiency; b) Student academic growth; c) College and career readiness (for high school); and d) Board performance and stewardship, including compliance with all applicable laws, regulations, and terms of the performance certificate.*

*Measurable performance targets shall be set by each charter holder for each public charter school for which it holds a charter in conjunction with its authorized chartering entity and shall, at a minimum, require that each school meet applicable federal, state, and authorized chartering entity goals for student achievement.*

*The performance framework shall allow the inclusion of additional rigorous, valid, and reliable indicators proposed by a charter holder to augment external evaluations of its performance, provided that the authorized chartering entity approves the quality and rigor of such proposed indicators, and that they are consistent with the purposes of this chapter.*

*For each public charter school it oversees, the authorized chartering entity shall be responsible for analyzing and reporting all data from state assessments in accordance with the performance framework.”*

This student performance data is published by the PCSC for its 37 authorized schools in its annual report and in its school specific performance certificates. These are available online at the PCSC website and are shared with the state legislature annually in public testimony from PCSC director Tamara Baysinger. These results are also shared widely with the Idaho general public through the *Idaho Education News* and other statewide media.

Once approved by a charter school authorizer, schools must complete a checklist of pre-opening tasks under specific guidelines, ranging from completing all necessary background checks for staff members, to ensuring that all necessary health and safety permits and inspections have been completed, to ensuring that necessary curriculum materials have been delivered. During the charter term, schools are subject to regular monitoring and evaluation.

Idaho’s charter school law is constantly evolving. In 2013 changes were made that increased charter school authorizer accountability through performance certificates while also creating a funding stream for charter facilities. Between 2014 and 2017, Idaho, with engagement from the Idaho Charter School Network, passed legislation that increased flexibilities for charter schools and streamlined the new school application process.

As discussed in Subsection (d), Bluum will work with the PCSC and district authorizers to identify those sub grant applicants, both those expanding or replicating and start-ups, that have demonstrated success by meeting or exceeding standards on an authorizer’s performance certificate or have demonstrated through the application process that they are likely to meet the objectives of this proposal. Bluum will coordinate with the PCSC and participating district



authorizers to monitor each sub grantee, both to determine the necessary level of technical assistance and support and to ensure that the sub grantee is on a clear trajectory of academic success, with priority on educationally disadvantaged and rural students.

Idaho last received federal CSP dollars in 2006. Even without CSP funding Idaho has a consistent track record of quality and diverse charter school growth. As noted in Subsection (a), since 2010, and during remarkably tough fiscal times for Idaho's state budget, 16 charter schools have opened across Idaho and several others have increased their enrollment. The state's charter enrollment increased from 14,611 students to 21,872 from 2010 to 2018. Idaho is home to the statewide charter support organization Bluum, the statewide charter school advocacy group the Idaho Charter School Network, and the Albertson Foundation. Additionally, the nationally recognized nonprofit facilities support organization Building Hope has an office in Idaho. Together these nonprofit charter support organizations provide the on-the-ground expertise and resources necessary to successfully navigate the incubation, expansion, replication, and improvement phases of charter school development.

Table 7 describes program design and implementation sub grant awards by amounts and proposed school expansion or enrollment size.

**TABLE 7: PROGRAM DESIGN AND IMPLEMENTATION SUB GRANT AMOUNTS BY SCHOOL SIZE**

Planned Student #s	0-300	301-500	500+
Grant Amounts	\$700,000	\$850,000	\$1,000,000

It is expected that a total of 19 sub grantee schools would participate in this CSP grant. Nine would be start-up schools. Five would be expansion and another five would be replication schools. Accordingly, \$3.5 million would be allocated for expansion, \$4.25 million for replication, and \$7.65 million for start-ups. Seven percent of the total budget,

or \$1,197,778, would be allocated for technical assistance to be organized by Bluum and delivered by the PCSC and contracted outside experts. Three percent of the budget (\$513,333) would be allocated for administrative support by Bluum. Refer to budget narrative for specificity and details.

**TABLE 8: YEAR-BY-YEAR BUDGET SUMMARY OF IDAHO’S CSP GRANT**

<b>Subgrantee Awards</b>						
<b>Expense Item</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>Total</b>
5 Expansion Grants	\$420,000	\$1,120,000	\$980,000	\$700,000	\$280,000	\$3,500,000
5 Replication Grants	\$1,710,000	\$1,560,000	\$700,000	\$280,000	\$0	\$4,250,000
9 Start-Up Grants	\$1,020,000	\$2,300,000	\$2,610,000	\$1,440,000	\$280,000	\$7,650,000
<b>Technical Assistance (7% of total grant amount)</b>						
<b>Expense Item</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>Total</b>
PCSC – 3%	\$160,000	\$161,200	\$62,400	\$63,600	\$66,133	\$513,333
TA/PD/research – 4%	\$235,300	\$55,300	\$194,000	\$17,700	\$182,145	\$684,445
<b>Grant Administration (3% of total grant amount)</b>						
<b>Expense Item</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>Total</b>
Bluum – 3%	\$97,100	\$101,000	\$103,000	\$105,100	\$107,133	\$513,333
<b>Grand Total CSP Grant Request</b>						
	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>Total</b>
<b>Grant totals</b>	<b>\$3,642,400</b>	<b>\$5,297,500</b>	<b>\$4,649,400</b>	<b>\$2,606,400</b>	<b>\$915,411</b>	<b>\$17,111,111</b>

*Idaho’s Prospective Charter School Pipeline:* Idaho has a pipeline of schools ready to serve as quality sub grantees through replication or expansion. The following examples illustrate our consortium’s ability to select sub grant applicants with the experience and capacity to improve educational results for students. As evidenced by their letters of support (see appendix F), successful charter schools are navigating significant market demand. Alturas International Academy in Idaho Falls is a K-8 school with a waitlist of over 475 students and is in the planning stages for a new high school. Compass Public Charter School, a K-12 school in Meridian, is perennially one of the five highest-performing public schools in the state of Idaho. The number of Compass students meeting both math and reading college ready benchmarks on the 2017 SAT exceeded the state average by more than double – 86% of Compass students vs.

32% statewide. Compass has a waitlist of over 300 students. It is in the planning phase of launching a new campus to serve more students in Idaho's fastest-growing school district.

Sage International School in Boise has a waitlist of over 500 students. It is a top-20 school statewide on the 2016-17 ISAT in both math and English Language Arts (ELA). It was number 10 in the state in terms of the percentage of students who met both the math and English benchmarks on the 2017 SAT. Meanwhile the school's student population has been growing steadily more diverse with 17.6% of students eligible for Free or Reduced Lunch (FRL) in FY2016, 18.2% of students FRL eligible in FY2017, and 26.8% FRL eligible in FY2018. Sage is in the planning phase of replicating a smaller campus version of their highly-successful International Baccalaureate program in rural Middleton (about 30 miles from downtown Boise).

Idaho's rural charter school sector is also growing. This is supported in part by Bluum's Idaho New School Fellowship. A fellowship was made available in early 2018 for charter school administrator Stephen Lambert to open a school in Fruitland (an agricultural community on the Idaho-Oregon border). Lambert is a highly-decorated retired Air Force Colonel who has been running the Atlanta Classical Academy for the last four years. In partnership with community leaders in Fruitland and the Hillsdale College Barney Charter School Initiative, Lambert will open the Treasure Valley Classical Academy in 2019-20. The school expects to serve 400 K-12 students. Lambert's one-year new school fellowship was funded jointly by the Albertson Foundation and the Larry and Marianne Williams Foundation.

In McCall, veteran educators Patrick Berg and Jenny Schon are planning a K-8 place-based charter school that utilizes a personalized learning model. Berg is currently a PK-12 Principal and Federal Programs Director for the neighboring Meadows Valley School District. Schon is currently a 6-12 science/electives teacher and Instructional Coach at Meadows Valley

School District. These schools, and others like them, believe that CSP grant funding will be necessary for them to *responsibly expand and replicate*, in order to ensure that they can generate more high-quality charter school seats at a fiscally responsible and sustainable rate.

**d) State Plan**

As stated previously, *the most significant outcome we expect from this project is to expand and open charter schools that serve students well academically and transform lives, especially for our most disadvantaged and rural students*. Bluum will leverage its partners in the Idaho consortium to carry out a robust quality charter school program, including a rigorous application and review process, differentiated monitoring, and high-quality technical assistance. All lessons learned will be shared with stakeholders across the state and beyond. This includes school districts (especially those that authorize charter schools), state agencies, the state legislature, and Idahoans more generally through a report in 2019, 2021, and 2023 on the **Communities of Excellence** activities and results summarized by a third-party review team.

*d.1. Monitoring*

Bluum will ensure that each eligible applicant that receives a sub grant under Idaho's **Communities of Excellence** grant will implement with fidelity the activities described in the sub grantee's application. In its current work with the Albertson Foundation, Bluum has developed a robust solicitation, screening, and evaluation process. This experience will help ensure this CSP funded program is well implemented and promotes sustainable charter school quality.

Idaho's performance-based accountability system (see **Competitive Preference Priority 6**) ensures that Idaho's public charter schools are held accountable for their academic, fiscal, and operational performance. This is especially true for the PCSC and its 37 authorized public charter schools. The Idaho State Department of Education (SDE) under Idaho statute also plays

an important role in this effort, and both authorizers and the SDE have processes and systems in place for overseeing the fiscal health of charter schools.

Per academic performance, **Idaho's Consolidated State Plan, pursuant to the federal ESSA**, requires public schools that serve grades K-8 to test students in ELA and mathematics in grades 3-8. Academic measures by school are provided by a) **achievement** on the Idaho Standards Assessments (ISAT) in English Language Arts and math; b) **growth** – as determined by the percentage of students on track to be proficient within three years; and c) English Learners making progress towards English language proficiency. Schools serving grades K-8 will also administer to students and report a Satisfaction and Engagement survey. For high schools and alternative schools, performance will be based on a) achievement on Idaho Standards Assessments in English Language Arts and math; b) English learners making progress towards English language proficiency; and c) 4-year cohort graduation rate.

Per **Competitive Preference Priority 6**, under Idaho code all authorizers and their authorized schools are required to utilize Idaho's school accountability system to execute a performance certificate that clearly sets forth the academic and operational performance expectations and measures by which the public charter school will be judged and held accountable. Authorizers, again led by the PCSC, have codified this into their charter school performance certificates, and this information is required by law to be made available to the public annually. Nothing being proposed in this CSP grant would preclude an authorizer from taking appropriate corrective action against a charter that failed to meet its authorizer's performance expectations.

Bluum, in coordination with school authorizers, will maintain a performance contract with all federal CSP sub grantee schools. This contract will be based on data and reporting

currently provided by the state accountability system under ESSA requirements and accumulated by authorizers, to ensure progress is being made towards achievement goals, performance benchmarks, accreditation, and compliance reporting requirements. A performance contract – separate from, but aligned with, an authorizer’s performance certificate – will be drafted and negotiated for each sub grantee that will set agreed too performance benchmarks for the two-year grant term. Bluum will report sub grantee school results for their third year to better track the overall effectiveness of this program. We expect sub grantee schools to have a performance benchmark report in their contract that includes these seven key indicators for K-8 schools:

**Indicator 1 – Are Students Meeting or Exceeding State Academic Achievement Targets?**

Mathematics	2019		2020		2021	
	School	Target	School	Target	School	Target
All Students		51.3%		54.6%		57.8%
Economically Disadvantaged		41.9%		45.8%		49.7%
Students with Disabilities		29.3%		34.0%		38.8%
Hispanic or Latino		35.0%		39.3%		43.7%
English Language Learners		22.6%		27.7%		32.9%
English Language Arts	2019		2020		2021	
	School	Target	School	Target	School	Target
All Students		60.8%		63.4%		66.1%
Economically Disadvantaged		50.5%		53.8%		57.1%
Students with Disabilities		29.2%		33.9%		38.6%
Hispanic or Latino		44.7%		48.4%		52.0%
English Language Learners		22.4%		27.6%		32.8%

**Indicator 2 – Are Students Meeting or Exceeding Academic Growth Targets?**

Mathematics	2019	2020	2021
	% Meet or Exceed	% Meet or Exceed	% Meet or Exceed
All Students	Baseline year		
Economically Disadvantaged	Baseline year		
Students with Disabilities	Baseline year		
Hispanic or Latino	Baseline year		
English Language Learners	Baseline year		
English Language Arts	2019	2020	2021
	% Meet or Exceed	% Meet or Exceed	% Meet or Exceed
All Students	Baseline year		
Economically Disadvantaged	Baseline year		
Students with Disabilities	Baseline year		
Hispanic or Latino	Baseline year		
English Language Learners	Baseline year		

**Indicator 3** – Student Enrollment: Is the school meeting or exceeding enrollment targets? If not, is there a workable plan in place to boost enrollment?

**Indicator 4** – Is the school’s audit clean and are there no defaults on debt agreements? If not, has the school authorizer taken appropriate action to improve/remedy the situation?

**Indicator 5** – Have there been changes to school leadership/board governance? If so, are replacements high quality, or is there a need to assist in finding appropriate talent?

**Indicator 6** – Is the school in good standing with its authorizer? If not, is there an agreed to plan for improvements and meeting all compliance requirements?

**Indicator 7** – Is the school in compliance with Idaho’s Student Satisfaction and Engagement survey? If not, has the school developed a plan for improvement? Is the plan credible?

For high schools and alternative schools, Indicator 7 will report on the school’s 4-year cohort graduation rate for those schools with a 12<sup>th</sup> grade.

All sub grantees will receive an onsite technical assistance and monitoring visit within the first 12 months of school operation to ensure activities occur as approved within the grant and for Bluum to gather information regarding future technical assistance. Additionally, prior to each subsequent fiscal year, the sub grantee will submit an annual progress report to Bluum delineating its progress against the seven indicators above, and if necessary, will explain adjustments to its plans to ensure all outcomes and goals are met.

To protect federal dollars, failure to demonstrate progress towards benchmarks and targets may result in cancellation of grant and the return of misused or unspent funds. For those sub grantee schools failing to meet expected benchmarks and targets, Bluum, in cooperation and coordination with the authorizing agency, will provide technical assistance to support school improvement efforts. Bluum staff will provide ongoing technical assistance for all sub grantees

by phone, email, and in-person meetings to ensure fidelity to the goals of this grant, and to ensure all appropriate accountability and reporting requirements are met.

*d.2. Working with Authorizers to Avoid Duplication of Work*

Staff time is a precious commodity for all public schools. To ensure monitoring under this grant is conducted efficiently, Bluum will work closely with the PCSC, participating district authorizers, and state agencies to streamline reporting requirements. For example, if a school's progress against stated outcomes is fully evaluated by an authorizer's performance certificate, Bluum will utilize the authorizer's data and information in lieu of a duplicate report from the school. Bluum will work with the PCSC and district authorizers on enhancing data sharing efforts to support collaborative efforts and reduce redundancies. This is a process already well underway in Idaho for both public charter schools and public school districts, and CSP funding would provide additional incentive to move even faster on compliance streamlining efforts.

As noted in **Competitive Preference Priority 6** and in Subsection (c), Idaho has developed rigorous application, pre-opening, monitoring, evaluation, and renewal processes over recent years. Further, Bluum has been working to develop new school talent and launch new great schools with significant grant support from the Albertson Foundation, as well as support on facilities financing and development from the nonprofit Building Hope. The end result is a high-performing charter school sector, and *this experience and work will be leveraged both in identifying promising new schools and talent, and in identifying existing high-quality schools for possible expansion or replication*. For current schools, Bluum will use the robust data included in school performance certificates (based on state accountability data) to determine whether a school seeking a grant for replication or expansion meets the NIA's definition of *high quality*. For new schools, Bluum will integrate the authorizer's application process, including a school's



score on the authorizer’s application rubric, into its CSP sub grant application in order to avoid duplicating the due diligence undertaken by the authorizer during the application process.

The **Communities of Excellence** application process will remain separate, however: *no school will be guaranteed a grant for the mere fact it has been authorized, nor will an existing high-quality school be awarded a grant if its expansion or replication plans do not satisfy grant application requirements.* Finally, as described in Subsection (d)(1), Bluum will coordinate with authorizers to monitor not only the use of grant funds, but also to measure the academic performance of sub grantees.

**Idaho’s Codes 74-201 and 202** *subject charter schools to open meetings and access to public records law.* Further, **33-5204(2)(C-D)** states charter schools must comply with both open public meetings and the disclosure of public records. Pursuant to **33-5209C**, authorized chartering entities “shall continuously monitor the performance and legal compliance of the public charter schools it oversees.”

#### *d.3.i Technical assistance and support*

Technical assistance will begin prior to eligible applicants receiving sub grants. After receiving the CSP award, Bluum will coordinate and offer Charter School Training to ensure that quality charter school developers and operators are able to learn about the opportunity to apply for funding through this project. This project builds on the current work of the PCSC that includes:

1) *New Charter Petitioner Guidance.* Although statute and administrative rule provide information regarding the required contents of a charter petition, petitioners often request additional guidance regarding the scope and nature of information their charters should include.

The guide takes petitioners through the development of a high-quality charter petition in order to maximize their chances of approval (see appendix F for PCSC Guidance Documents).

2) *Pre-Opening Guidance*. The PCSC’s pre-opening guidance includes interactive project management tools, resources, and advice on topics ranging from employee recruitment to governance training, and a series of one-on-one meetings to exchange information and support.

3) *New School Leader Orientation*. Many public charter schools hire administrators who have not previously worked in the charter school sector. They face new challenges as they adjust to leading not only a school, but a charter LEA. The PCSC offers written and in-person orientation materials to introduce new administrators to the role of the authorizer, charter-specific requirements and expectations, and resources available to support their work.

Further, the *Idaho State Department of Education* (SDE) provides a “Charter Start 101” workshop for prospective school leaders and board members. This annual workshop introduces new charter school leaders and board members to the SDE’s federal program officers. These federal program officers explain legal and compliance requirements to new school operators. School administrators that participate in this annual meeting are registered for Idaho’s “Consolidated Federal and State Grants Application” (CFSGA) portal. Through this portal charters can apply for federal funds, manage these funds, report on the funds as needed, and certify compliance with all appropriate rules and regulations. Through this training, CFSGA portal, and ongoing process, charter schools can access all federal Title dollars available to their students while ensuring they receive their commensurate share of federal support.

In addition to PCSC- and state-provided trainings and technical assistance, Bluum will coordinate technical assistance training for prospective sub grantees to address issues specific to the federal CSP grant as described in Subsection (c) above. Each eligible applicant’s submitted

budget, which shall include no more than 18 months of planning or a total length of three years, includes a subsequent “sustainability year” for the eligible applicant to demonstrate how it will continue to carry out activities after CSP funding expires. The sustainability budget and accompanying narrative must demonstrate the drawdown of funding through the increased capacity of existing staff. Furthermore, the sustainability budget should demonstrate how other eligible state, federal, and philanthropic funding will be used to support the ongoing needs of the school to ensure a commitment to quality beyond the CSP dollars provided through this project.

Once an eligible applicant receives a sub grant, Bluum will work with the PCSC and partner organizations that have staff capacity and expertise in providing effective direct technical assistance to schools. Bluum’s identified technical assistance partners will be responsible for providing support to eligible applicants resulting in a successful CSP application. Further, each autumn Bluum will coordinate with the PCSC and outside experts in developing and coordinating training that supports charters in their effective implementation of CSP funds and federal programs.

*d.3.ii. Technical assistance and support for quality authorizing efforts*

As described in Subsection b.2., in addition, Bluum will allocate 3% of the grant (\$490,000 over the grant term) to the PCSC for the development of portfolio and performance management software and to aid in coordinating and providing technical assistance and support for eligible applicants. These resources will allow the PCSC to automate and streamline most mandated compliance requirements. This management software will allow the PCSC to more effectively track reporting, compliance, and performance data shared with schools, other authorizers, and state and community partners (including Bluum). It would also help expand the

state's overall capacity to provide high-quality authorizing for more schools. Dollars would also be available for a partial FTE to help accommodate PCSC's new school growth.

Upon receiving CSP funds, Bluum will work with the PCSC and the State Board to coordinate with NACSA, or some other national expert group, on a 2019 version of Idaho's *Authorizer Evaluation Report* (see appendix F). The 2019 evaluation would help set the baseline for further improvements to state policies and for the day-to-day work and policies of the PCSC, and offer recommendations for improving and expanding PCSC/school district authorizer collaboration. A 2024 evaluation would provide a coda for authorizing lessons and best practices learned and offer next steps into the mid-2020s. Through this process some district authorizers may decide to leave authorizing and turn their schools over to the PCSC. This may be a positive outcome for school quality in some cases.

#### **e) Quality of Management Plan**

Idaho's **Communities of Excellence** project has *one primary goal*: To leverage all federal, state, and philanthropic resources in order to ensure Idaho's growing charter school sector is high quality and highly effective in meeting the academic needs of all students, especially our most vulnerable and underserved.

##### *1. Responsibilities, timelines, and milestones*

To achieve our primary goal, Idaho will utilize the logic model found below. As explained throughout this Project Narrative, we will leverage a variety of resources and consortium partners to execute activities that are aligned to outputs and outcomes (short-, mid- and long-term outcomes) to demonstrate achievement of the four objectives described in Subsection b. Leveraging CSP funding across sub grants and technical assistance, Idaho will

meet this primary goal by supporting the school's 0-year and 1<sup>st</sup>-year, or 1<sup>st</sup>-year and 2<sup>nd</sup>-year, and technical assistance across program design and initial launch.

<i>Logic Model for Idaho's Community of Excellence Proposal</i>					
Inputs & Resources	Activities	Outputs	Short-Term Goals	Mid-Term Goals	Long-Term Goals
<b>Objective 1: Increase the number of quality charter school seats by 8,200 students</b>					
Bloom, PCSC, State Board, & nonprofit/philanthropic partners	-Bloom & consortium partners announce Communities of Excellence sub grant project and statewide charter training sessions -Bloom runs rigorous competitive RFP process to solicit high quality sub grant applications -Bloom & expert partners share best practices & provide technical assistance on an ongoing & regular basis	Sub grants awarded to highest quality applicants to launch, replicate & expand high-quality charter schools while helping improve Idaho's overall charter sector by demonstrating best operating and authorizing practices	By 2020, 2 new schools will be operational, 1 school expansion will be underway & 3 school replications will be underway	By 2022, 8 new schools will be operational, 4 total school expansions will be underway & 5 school replications will be underway	-Increase the number of high-quality charter school seats available to Idaho students and families by successfully implementing 19 sub grants statewide -Sub grantee charter schools' student mix will be <5% of state averages for non-white, ELL, special needs and economically disadvantaged
Inputs & Resources	Activities	Outputs	Short-Term Goals	Mid-Term Goals	Long-Term Goals
<b>Objective 2: Support and expand the PCSC's standing as a leader in authorizing quality while disseminating and supporting best practices for other authorizers statewide.</b>					
PCSC, State Board, Bloom, district authorizers & external experts	-PCSC identifies, purchases & incorporates portfolio & performance management software -Authorizer evaluation report is coordinated with national charter authorizing experts -Twice-yearly workshops are organized for district/possible university authorizers	-PCSC expands its capacity to authorize more high-quality charter schools -Outside expert such as NACSA generates an authorizer evaluation report and sets a baseline PCSC authorizer performance -Workshops are developed & delivered for non-PCSC authorizers	-PCSC expands its portfolio of quality schools by 2 to 4 schools annually -PCSC with Bloom support shares best practices & TA widely with districts & universities	-PCSC expands its portfolio of high performing schools by at least 12 schools -District authorizing improves in Idaho	Increased percentage of charter schools in authorizers' portfolios identified as quality and/or improving
Inputs & Resources	Activities	Outputs	Short-Term Goals	Mid-Term Goals	Long-Term Goals
<b>Objective 3: Evaluate and disseminate widely successes and lessons to impact larger education system</b>					
Bloom, State Board & external experts	-Bloom coordinates with State Board and external experts the collection and analysis of student outcome data for all sub grantees -Evidence-based best practices identified and shared -Bloom coordinates student, parent and community focus groups and shares their lessons	-Bloom coordinates annual 3rd-party evaluation of Idaho's <b>Communities of Excellence</b> Project -Bloom hosts annual best practices conference -Research & evaluation identifies best practices & opportunities for future growth -Parents and communities feel engaged in creating and supporting charters	-Sub grantees meet or exceed state academic achievement targets -Sub grantees meet or exceed state academic growth targets	Sub grantees decrease the academic achievement gap between historically underserved students and state averages	-Increased academic outcomes for students attending Idaho charter schools -Increased academic outcomes for all Idaho students -Greater awareness around charter schools and their performance in Idaho

The Idaho **Communities of Excellence** management plan is summarized in Table 9.

Table 9: Communities of Excellence Management Plan		
<b>Objective 1:</b> <i>Increase the number of quality charter school seats in Idaho by 8,200 students</i>		
<b>Responsible parties:</b> Bluum, PCSC, and State Board		
<b>Resources:</b> Federal CSP grant dollars, Bluum, PCSC, and State Board in-kind support		
<b>Partners:</b> Albertson Foundation, national experts and nonprofit partners (e.g. Building Hope), school operators, community & parent groups, school districts		
Activities/Strategies to Meet Objectives	Outputs/Deliverables Resulting from Strategies	Outcomes
Bluum develops rigorous RFP to solicit applicant to compete for CSP sub grants	Applications reviewed, with preference points awarded for post-secondary options and rural initiatives	Increased number of high-quality charter school seats available to Idaho students statewide
Bluum organizes statewide charter school training workshops for potential applicants and authorizers; Bluum & external experts offer TA to enable highest-quality proposals	Bluum coordinates sharing of best practices for: staffing plans, PD plans, acquisition of supplies, training & equipment, engaging stakeholders, and non-sustained costs for charter opening, replication, or expansion	
Bluum develops scoring rubric, selects & trains Peer Reviewers for rating CSP applications	Highest-quality applicants selected for CSP sub grants	
Bluum awards sub grants for planning, expansion, replication, & improvement	Sub grant recipients notified & participate in meetings with Bluum staff to understand programmatic, financial, & evaluative expectations for their efforts	
Bluum, PCSC, State Board & nonprofit/philanthropic partners, as well as sub grantees, engage students' families & community stakeholders in decision making relevant to CSP grant objectives	From start & throughout implementation, family & stakeholder contributions are sought & valued, informing project strategies	
Bluum, with support of external experts, conducts onsite monitoring of all sub grantees within first 12 months	Sub grantees adherence to approved activities ascertained; TA needs identified	
Bluum & authorizers ensure that sub grantees develop transportation plan & tap state funding streams	Charter schools transportation plans address the needs of all students, including homeless & students with disabilities	
Bluum coordinates training with experts and state agencies for charter access to federal funding and state resources	Charter schools receive their equitable share of federal and state dollars, e.g. Title 1, Special Education, transportation reimbursement, etc.	
Bluum coordinates training with outside experts & state agencies to offer annual fall/spring federal programs training, prior to CSP sub grant application period	Charters attend annual fall/spring federal programs training, receiving ongoing PD & TA, and opportunities to collaborate with other LEAs across Idaho	
Charters contract with independent auditor, in order to participate in annually-required financial audits	PCSC & participating district authorizers work with charters in the resolution of any findings from audits	

PCSC & participating district authorizers monitor their schools in compliance with their school performance certificates	PCSC & participating district authorizers may revoke a charter at any time, after notification & time for corrective action	
Bluum coordinates RFP, scoring rubric, & peer review process	Sub grantees are selected and provided support with incubation, replication, expansion, and/or improvement	
Bluum coordinates experts and state agencies to provide support to charter school applicants and sub grant awardees focused on, but not limited to: -Incubation support -Supporting all students -Teacher recruitment & retention -Instructional supplies & technology -Professional development & licensing -Parent, family, & community outreach	Initial supports provided to applicants and sub grantees focus on school and network level needs assessments, special education, ELL, incubation, staffing & instructional supports, & stakeholder outreach	
Bluum surveys applicants and sub grantees on the quality of supports provided by outside experts and nonprofit partners	Applicants provide information to Bluum and State Board about quality of support services they receive from outside experts and nonprofit partners	
<b>Objective 2:</b> <i>Support and expand the PCSC’s standing as a leader in authorizing quality while disseminating and supporting best practices for other authorizers statewide</i>		
<b>Responsible parties:</b> PCSC, State Board, Bluum, & outside experts/nonprofit partners <b>Resources:</b> Federal CSP grant dollars, Bluum, PCSC, and State Board in-kind support <b>Partners:</b> National experts & nonprofits (e.g., NACSA), and school districts		
Activities/Strategies to Meet Objectives	Outputs/Deliverables Resulting from Strategies	Outcomes
PCSC partners with national charter group to launch and implement portfolio & performance management software	PCSC operates and trains all authorized schools in use of portfolio & performance management software	Quality charter school authorizing in Idaho is expanded to more public charter schools
Bluum coordinates with national experts on charter authorizing and the PCSC on a 2019 Authorizer Evaluation Report, and a follow-up report in 2024	-2019 Authorizer Evaluation Report that includes recommendations for: a) improving authorizing efforts of PCSC, b) improving authorizing policies statewide; and c) improving district authorizer practices. Follow-up report to be issued in 2024	
Bluum and PCSC coordinate with national expert on charter school authorizing to develop training for districts and and other eligible public and private entities interested in becoming high-quality charter school authorizers	-Multi-year curriculum of trainings & resources designed to assist all Idaho authorizers -Across 5-year grant period sustained TA & PD is made available to all Idaho charter school authorizers -Across 5-year grant period two annual trainings will be provided to promote collaboration among authorizers, share challenges/best practices in critical areas, e.g., financial oversight, SpEd & EL	

	rights, enrollment/recruitment compliance, discipline policies	
<b>Objective 3:</b> <i>Evaluate and disseminate widely the successes and lessons of the <b>Communities of Excellence</b> project</i>		
<b>Responsible parties:</b> Bluum, PCSC, State Board, & outside experts/nonprofit partners		
<b>Resources:</b> Federal CSP grant dollars, Bluum, PCSC, and State Board in-kind support		
<b>Partners:</b> Parents, community leaders, national expert researchers/nonprofit partners, old & new media		
Activities/Strategies to Meet Objectives	Outputs/Deliverables Resulting from Strategies	Outcomes
In collaboration with State Board, systems are developed by Bluum to identify & report all data collection elements relevant to CSP grant	Elements include both federal GRPA required elements, as well as project-driven elements identified by Idaho (as articulated in Objectives 1-2)	All lessons learned through the <b>Communities of Excellence</b> Project are shared widely across the state of Idaho and nationally
In collaboration with State Board and authorizers, Bluum collects student performance data on statewide assessments for all sub grantee charters	An annual summary of the academic, fiscal, and compliance performance of all sub grantee charter schools is created, which provides key data points for Communities of Excellence annual report	
Outside expert nonprofit is engaged to generate annual report – utilizing state achievement data, authorizer reports, etc. – on the efforts, lessons learned, and impact of Communities of Excellence	Communities of Excellence annual report is generated and its key findings and lessons are disseminated widely across the state of Idaho and nationally	
Bluum coordinates expert research team and key stakeholder focus groups for both qualitative and quantitative research	Reports in 2019, 2021, and 2023 summarizing parent and community engagement and lessons learned.	
All evaluation results, annual reports, and community & parent engagement surveys are broadly disseminated	Lessons learned from Communities of Excellence project is shared via Bluum, state, and national partner networks	

## 2. Time commitment of key personnel

Bluum is the nonprofit statewide school support entity in Idaho that will lead this project. Bluum assumes full legal responsibility for ensuring all funds received through the award are used for the purposes and intent outlined in the conditions of the grant agreement. Annual performance and compliance reviews will be performed to ensure compliance with both federal and non-federal guidelines and Bluum policies. Any compliance or performance findings will result in: 1) disallowance of expenditures; 2) development of a corrective action plan, shared with USDOE, Idaho State Board of Education, and the PCSC that addresses/corrects the



findings, and 3) if not corrected, possible cancellation of grant and return of misused or unspent funds.

Bluum will retain direct management of 100% of funds, including the 90% reserved for direct sub grants to eligible applicants. Bluum will utilize the 3% administrative set aside to support the administration of the sub grant application process and coordinating other partners to provide technical assistance to both authorizers and support organizations. The remaining 7% of funds will support technical assistance to both eligible applicants receiving sub grants under the state entity's program and quality authorizing efforts in Idaho (see project budget and narrative).

Bluum's governing board is made up of experts and practitioners in charter school operations and facilities, education law, business, and philanthropy (see appendix B for bios). The board oversees and provides guidance to Bluum management; Terry Ryan, CEO of Bluum, will serve as the project director with the main responsibility for executing Idaho's state plan. His time, along with that of Bluum's CFO Marc Carignan, will be provided in-kind to this project (see appendix B for Ryan and Carignan resumes). Ryan will dedicate 40% of his time to overseeing the effective administration and implementation of this project. Carignan will provide financial oversight and will commit 40% of his time.

Personnel charges of 1.35 FTE reflect a first-year cost of \$83,000 (plus benefits) including an annual 2% salary increase to equal \$513,333 over the 5-year term of the grant. 1.0 FTE will be for a Director of Federal Grants and Support (\$62,000 first-year salary). This professional (see appendix B for Felton resume) will oversee the daily operations of the CSP grant, with direction from the CEO and CFO of Bluum. These daily operations will include directing the training activities, coordinating contractual agreements with the technical assistance and research partners, implementing the project application, managing effective oversight of the grant and

monitoring of sub grantees, and coordinating the project evaluations. 0.35 FTE will be for a Charter Grant Auditor (\$21,000 portion of first-year salary). This professional will provide internal fiscal support to Bluum to process grant contracts, provide fiscal guidance to sub grantees, and coordinate audits and reporting with the Idaho Public Charter School Commission (PCSC) (see appendix B for Kargou resume). This will allow the same professional, with oversight and support from Bluum's CFO, to support the charter school's initial needs through CSP funding while also providing technical assistance for other federal programs in charter schools, such as Title I, Title II, and IDEA. The charter schools receiving CSP funding will need comprehensive technical assistance across all federal funding streams, and the assigned specialist can support the layering and braiding of several funding streams to support a school's mission and objectives.

*Note, all of this administrative work by Bluum will be coordinated closely with the activities of the PCSC and participating district authorizers to avoid duplication of work for the charter schools, authorized public chartering agencies, and Bluum.*

#### **f) Parent and Community Involvement**

Idaho's consortium is committed to ensuring that the charter schools opened and sustained under the **Communities of Excellence** project are in tune with their communities' needs and priorities. This is critically important precisely because Idaho's charters are locally initiated. Their vitality and long-term sustainability is dependent upon their roots in their communities.

Our plan is to systematically conduct research and engagement initiatives that will reliably assess and authentically engage stakeholder perspectives. Using qualitative and quantitative methods, Idaho will coordinate efforts across sub grantee charter schools to connect with and hear the voices of their key stakeholders – parents, community leaders, teachers, and students. This work will allow schools to stay aligned with the expectations of their constituencies and

continue to tap the enthusiasm and expectations of their communities. We envision three phases:

- 1) Qualitative research: conduct focus groups with parents in charter school communities; conduct interviews with local leaders in charter school communities; conduct focus groups with teachers. These focus groups and interviews will occur in 2019, 2021, and 2023.
- 2) Quantitative research: conduct surveys of charter school parents, teachers, and students in the upper grades. These surveys will occur in 2019, 2021, and 2023.
- 3) Engagement: in-depth briefings and discussions of the focus group and survey results with charter and consortium leaders; town-hall style discussions of the results with parents and key community stakeholders. These meetings will occur in 2019, 2021, and 2023.

*Phase 1:* Bluum has already started creating the infrastructure for the research and engagement that we will cultivate in charter school communities. In March 2018, Bluum contracted with the nationally renowned FDR Group to conduct four exploratory focus groups with parents in four communities across Idaho where parents and community leaders are considering opening new charters (see appendix F for FDR Group’s focus group summary and *Hispanic Parents Speak Out*). The FDR Group interviewed local leaders in those communities from such sectors as business, nonprofit organizations, and public office. These were professionally moderated focus groups and interviews conducted by an independent, nonpartisan research firm. The researchers listened to people’s concerns about their local schools, gauged receptivity to different charter school models, and learned how to effectively communicate with parents. After the new schools have opened their doors, there are plans to conduct focus groups with teachers.

*Phase 2:* Bluum will coordinate with the FDR Group, or some similarly well-regarded national education research group, to coordinate sub grantee charter school surveys of parents,

teachers, and students. We expect three rounds of surveys during the 5-year term of this CSP grant – one to set a baseline in 2019, one midway through the project in 2021 to inform direction, and one during the final year of the grant as a summative document and a guide for moving forward after CSP funds end. When crafted and executed well, surveys are invaluable tools for systematically gauging the views of broad cross sections of populations. We need surveys because it can be difficult to reliably decipher stakeholder attitudes simply by relying on intuition and impressions of building leaders. For example, many parents are inactive in school affairs, too busy or cautious or uncomfortable to make their voices heard. On the other hand, a handful of very active parents often garner high levels of attention. A well-designed survey broadens our capacity to reach out and listen.

To ensure that the survey work is undertaken and received with credibility and authority, the questionnaires will be written and the analyses undertaken by independent public opinion researchers recognized for their professionalism and non-partisanship. They will also include benchmark questions from surveys conducted by outside agencies that will allow comparisons to statewide data. We think it is most feasible to field the surveys online, using the email addresses of the stakeholders as gathered by the charter schools. To garner high response rates, each school will be asked to pay careful attention to the roll-out of the surveys and ensure that they are accessible to the populations surveyed (e.g., making Spanish versions available, making paper versions available). Survey respondents will be assured of confidentiality.

*Phase 3:* To make sure the concerns of parents and communities are heard, charter leaders, the PCSC, and other members of the Idaho consortium will receive in-depth briefings on the survey results. These sessions – in 2019, 2021, and 2023 – will be opportunities to reflect on progress made, to compare results across communities, and to identify areas that need

strengthening. The survey results will be presented and discussed with the very populations surveyed. We envision feedback and reflection loops that will openly inform our work.

The results of the surveys will be made public in order to facilitate a broader discussion about where charter schools fit into Idaho’s education landscape, how and why certain schools are succeeding or not succeeding, and how best to ensure that charter schools are given the tools and support necessary to meet the needs of their families and communities.

#### **g) Flexibility**

Idaho’s public charter schools preserved flexibilities include those in Table 10:

**Table 10: Basic Charter Flexibilities in Idaho Code**

1) As noted under Competitive Preference Priority 1, Idaho law allows a variety of charter school authorizers, including the PCSC, school districts, and public and nonsectarian colleges and universities <b>(33-5202A)</b> .
2) Charters are allowed to be their own LEAs and are fiscally and legally autonomous schools with independent charter school boards organized and managed under the Idaho nonprofit corporation act <b>(33-5204(1))</b> .
3) A charter school may sue or be sued, purchase, receive, hold and convey real and personal property for school purposes, and enter into contracts in its own name, including contract for services <b>(33-5204(3))</b> .
4) A charter school may borrow money to finance the purchase or lease of school building facilities, equipment and furnishings for those buildings <b>(33-5204(4))</b> .
5) A nonprofit charter school board may hold multiple charters <b>(33-5204(1))</b> .
6) Teachers in charter schools are considered public school teachers and employees of the charter school. The staff of public charter schools are considered a separate unit for the purposes of collective bargaining <b>(33-5206(3))</b> . As of 2018, however, there are no unionized charter schools in Idaho.
7) Charter school teachers are part of the Public Employee Retirement System of Idaho.
8) Charter School can contract with EMOs and CMOs for management purposes <b>(33-5206(10)a)</b> .
9) Virtual charter schools are allowed <b>(33-5205(6))</b> .

Charter school stakeholders, led by the Idaho Charter School Network, are working with stakeholders, policy makers like the State Board, and lawmakers to create additional flexibilities. For example, the passage of House Bill 279, signed by Governor Otter in April 2017, streamlined the procedures for opening new charter schools by simplifying the process,

compressing the timeline, and clarifying expectations for schools and authorizers, while at the same time maintaining a high standard of review for new charters.

Bluum will work closely with the 501(c)4 membership organization the Idaho Charter School Network, the National Alliance for Public Charter Schools, and local school leaders and operators to ensure that charters maintain and expand their operational flexibilities in coming years. During the 2018 legislative session, the Idaho Charter School Network, with support from the National Alliance, introduced HB566 that sought the flexibility to hire – without going through traditional certification routes – alternative school administrators who have been successful in the military, law, business, or government. The bill passed both the House and the Senate but was vetoed by Governor Otter in his last legislative act as governor. The Idaho Charter School Network expects to push for increased charter school flexibilities and space for innovation in 2019 and beyond.

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**\*Assurances**

Idaho’s signed assurance can be found in appendix A.

**\*Federal Waivers**

Idaho Requests no federal waivers for this project.

**\*State Waivers**

This provision is not applicable to Idaho.

**Idaho's Communities of Excellence 2018 'Charter Schools Program Grants to State Entities' Budget Narrative**  
*Submitted in Support of Idaho's Application for CSP Grants to State Entities 2018*  
*CFDA Number: 84.282A*

**Budget Narrative**

Bluum, a Boise-based, statewide nonprofit charter school support entity, requests, in partnership with the **Communities of Excellence** consortium, \$17,111,111 over a five-year term from the federal Charter School Program (CSP) (see **Table 2**). This CSP grant will help Idaho meet three objectives that are well-aligned to CSP competitive priorities:

- a) 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;
- b) support the Idaho Public Charter School Commission (PCSC) in expanding its quality authorizing efforts while disseminating and supporting best practices for other authorizers statewide; and
- c) evaluate and disseminate widely the successes and lessons of high-quality charter schools to impact the broader education system.

The requested CSP grant would provide \$15,400,000 in direct funding to sub grantees to open, expand or replicate public charter schools. An additional \$1,711,111 (10% of total grant amount) is sought in funding for technical assistance, professional development, program evaluation and dissemination of lessons learned; and for administration of sub grant awards.

## Sub grantee Awards

The request allows for the development of 8,200 additional charter school seats in Idaho. The funds will be distributed during a 5-year grant period, with each school award funded over 24-months, described as “Activity (b)1.1” in the grant application. Sub grantee award amounts range from \$700,000 to \$1,000,000, dependent upon the number of new seats each school will create:

Table 1 – Sub grantee Award Amount			
Enrollment Growth:	0-300	301-500	501+
Base grant amount:	\$700,000	\$850,000	\$1,000,000
First-year payment	\$420,000	\$510,000	\$600,000
Second-year payment	\$280,000	\$340,000	\$400,000



**TABLE 2 - CSP BUDGET SUMMARY (IDAHO):**

Expense Item	ED 524 line	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	Grand Total	%	Description of costs
<b>Sub-Grantee Awards</b>									
Expansion Grants (5 total)	8. Other	\$ 420,000	\$ 1,120,000	\$ 980,000	\$ 700,000	\$ 280,000	\$ 3,500,000	20.5%	Grant awards based on enrollment plan, see table 2
Replication Grants (5 total)	8. Other	\$ 1,710,000	\$ 1,560,000	\$ 700,000	\$ 280,000	\$ -	\$ 4,250,000	24.8%	Grant awards based on enrollment plan, see table 2
Startup Grants (9 total)	8. Other	\$ 1,020,000	\$ 2,300,000	\$ 2,610,000	\$ 1,440,000	\$ 280,000	\$ 7,650,000	44.7%	Grant awards based on enrollment plan, see table 2
		\$ 3,150,000	\$ 4,980,000	\$ 4,290,000	\$ 2,420,000	\$ 560,000	\$ 15,400,000	90%	
<b>Technical Assistance via grant award to Idaho Public Charter School Commission (PCSC)</b>									
Portfolio and Performance	8. Other	\$ 100,000	\$ 100,000	\$ -	\$ -	\$ -	\$ 200,000		Subgrant to PCSC for software development and deployment costs.
Staffing - Authorizer	8. Other	\$ 60,000	\$ 61,200	\$ 62,400	\$ 63,600	\$ 66,133	\$ 313,333		Subgrant to PCSC for staffing for expansion of PCSC new school supports & authorizing.
<b>Technical Assistance - PCSC (3%):</b>		\$ 160,000	\$ 161,200	\$ 62,400	\$ 63,600	\$ 66,133	\$ 513,333	3%	
<b>Technical assistance provided through Bluum</b>									
Activity (b)1.1: Peer review team stipends	1. Personnel	\$ 9,000	\$ 9,000	\$ 8,000	\$ 3,000	\$ -	\$ 29,000		Peer review teams - 2 outside evaluators (\$500 stipend each) paid as stipend (1099 contractor, no fringe benefit costs).
Activity (b)1.3: Provide high quality technical assistance to aspiring applicants	3. Travel	\$ 3,600	\$ 3,600	\$ 3,600	\$ 3,600	\$ -	\$ 14,400		Estimated annual travel costs for three training sessions in three parts of the state. Bluum will coordinate with the PCSC to provide three training sessions per year during the first four years of the grant. Labor is not charged to the CSP grant as it is provided by Bluum and PCSC.
Activity (b)2.2: Authorizer Quality Assessment	6. Contractual	\$ 30,000	\$ -	\$ -	\$ -	\$ 30,000	\$ 60,000		Based on comparative costs of prior assessments, Bluum will contract with a nationally recognized authorizing expert (e.g. NACSA) to perform 2018-19 evaluation of charter authorizer quality (baseline) and a 2022-23 evaluation to evaluate progress.
Activity (b)2.3: Authorizer Training	3. Travel	\$ 2,100	\$ 2,100	\$ 2,100	\$ 2,100	\$ 2,145	\$ 10,545		Estimated travel expenses for training consultant, Bluum and PCSC staff for on-site visits.
On-site Technical Assistance Specialists	6. Contractual	\$ 28,800	\$ 28,800	\$ 20,000	\$ 3,200	\$ -	\$ 80,800		Each on-site visit includes 8 hours of technical support from contracted specialists, at a blended rate of \$100/hr, considered 1099 contractors (no benefits), one visit per new grant recipient.
On-site Technical Assistance Travel	3. Travel	\$ 9,000	\$ 9,000	\$ 7,500	\$ 3,000	\$ -	\$ 28,500		Estimated travel expenses for training consultant, Bluum and PCSC staff for on-site visits.
Outside expert cost - annual CSP grant compliance training	6. Contractual	\$ 800	\$ 800	\$ 800	\$ 800	\$ -	\$ 3,200		Further, each fall Bluum will coordinate with the PCSC and outside experts training specifically for charter schools to support the
Travel - annual CSP grant compliance training	3. Travel	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ -	\$ 8,000		Estimated travel expenses for training consultant, Bluum and PCSC staff.
Activity (b)3.2: Parent/Community Input and Engagement	6. Contractual	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ 75,000	\$ 225,000		Budget based on estimated service contract based on previous work conducted in Idaho.
Evaluation Reports	6. Contractual	\$ 75,000	\$ -	\$ 75,000	\$ -	\$ 75,000	\$ 225,000		Budget based on estimated service contract based on previous work conducted in Idaho.
<b>Technical Assistance - Other (4%):</b>		\$ 235,300	\$ 55,300	\$ 194,000	\$ 17,700	\$ 182,145	\$ 684,445	4%	
<b>Grant administration provided by Bluum</b>									
Direct cost, grant management personnel	1. Personnel	\$ 83,000	\$ 86,300	\$ 88,000	\$ 89,800	\$ 91,500	\$ 438,600		Grant Manager, 1 full FTE, with base salary of \$62,000 Y1, and Grant Accountant/Auditor, .30 FTE, with base salary of \$70,000 x .30 FTE equals \$21,000 first year; 2% annual compensation increases for years 2-5.
Direct cost, grant management fringe benefits	2. Fringe Benefits	\$ 14,100	\$ 14,700	\$ 15,000	\$ 15,300	\$ 15,633	\$ 74,733		Fringe benefits budgeted at 18% of compensation based on average Bluum historical cost of fringe benefits for this level of staff.
<b>Administration - Bluum (3%):</b>		\$ 97,100	\$ 101,000	\$ 103,000	\$ 105,100	\$ 107,133	\$ 513,333	3%	
<b>Grand Total, Grant Request:</b>		\$ 3,642,400	\$ 5,297,500	\$ 4,649,400	\$ 2,606,400	\$ 915,411	\$ 17,111,111	100%	

## **Technical Assistance and Grant Administration**

Seven percent of the total CSP grant award will be allocated toward providing technical assistance. The Idaho Public Charter School Commission would receive 3% of the allocated technical assistance funding, totaling \$513,333 during the 5-year term of the CSP award. \$200,000 of the budget is earmarked for the development and deployment of a Portfolio and Performance Management Software System. This management system will allow the PCSC to automate its track reporting, compliance, and performance data. Based on authorizer best practices across the country, the charter performance management system will expand Idaho's capacity to provide high-quality authorizing across a state as geographically large as Idaho. The remaining funds (\$313,333) are budgeted to allow the PCSC to add a staffer to help manage the growth in authorized schools and to assist in the implementation of a Portfolio and Performance Management Software System. This is based on a budget of \$60,000 in year one of the CSP grant, increasing by 2% per year through year five.

Bluum would manage and coordinate the remaining 4% of technical assisting monies, totaling \$684,445, to support the following activities outlined in the CSP grant application:

- **Activity (b)1.1:** Implement sub grant program – Peer review teams - 2 outside evaluators (\$500 stipend each) paid as stipend (1099 contractor, no fringe benefit costs). Budget based on number of budgeted grant awards each year, plus 33% more reviews for applicants that do not pass the review process.
- **Activity (b)1.3:** Provide high-quality technical assistance to aspiring applicants, including conducting three in-person introductory Charter School Grant workshops annually across the state (in Boise, Idaho Falls, and northern Idaho) to announce

the CSP grant, to explain how to apply, and to answer questions. Further, we will run two statewide webinars annually on the CSP grant opportunity. This activity will take place in autumn 2018, 2019, 2020 and 2021.

- **Activity (b)2.2:** Contract with a nationally recognized charter school authorizing expert to perform a 2019 evaluation of Idaho charter authorizer quality (baseline), and in the fifth-year of the grant to summarize the authorizer work carried out under this grant, to share lessons learned, and to provide guidance for Idaho in moving quality authorizing forward post-CSP funding.
- **Activity (b)2.3:** During the first four years of this grant, Bluum will coordinate with the PCSC annual charter school authorizing workshops for district authorizers.
- **Activity (b)3.1:** Bluum will coordinate with the State Board of Education and the PCSC to track, analyze, and report student ISAT achievement and student growth data. This will inform the evaluation of the impact of charter schools on student achievement and school improvement efforts more generally. Bluum will contract with outside experts to compile and disseminate best practices and lessons learned.
- **Activity (b)3.2:** Bluum will engage parents and community throughout this project. Bluum will identify, contract and coordinate with an outside survey expert to engage parents and community leaders through a series of focus groups and surveys. An expert third-party report on the performance and progress of charter schools under the **Communities of Excellence** project will be issued in 2019, 2021 and 2023. Bluum is experienced in sharing rigorous and robust information on charter school performance and lessons learned in Idaho and across the country.

These funds are allocated for a variety of contracted services, training and dissemination costs, associated travel, and miscellaneous costs, see budget totals in **Table 2**.

### **Grant Administration**

Terry Ryan, CEO of Bluum, will serve as the project director with the main responsibility for executing Idaho's state plan. His time, along with that of Bluum's CFO Marc Carignan, will be provided in-kind to this project (see appendix B for Ryan and Carignan's resumes). Ryan will dedicate 40% of his time to overseeing the effective administration and implementation of this project. Carignan will provide financial oversight and will also commit 40% of his time.

Personnel charges of 1.35 FTE reflect a first-year cost of \$83,000 (plus benefits) including an annual 2% salary increase to equal \$513,333 over the 5-year term of the grant. 1.0 FTE will be for a Director of Federal Grants and Support (\$62,000 first year salary). This professional (see resume at appendix B for Amy Felton) will oversee the daily operations of the CSP grant, with supervision and direction from the CEO and CFO of Bluum. These daily operations will include directing all training activities, coordinating contractual agreements with the technical assistance and research partners, implementing the project application, managing effective oversight of the grant and monitoring of sub grantees, and coordinating the project evaluations. 0.35 FTE will be for a Charter Grant Auditor (\$21,000 portion of first year salary). This professional will provide internal fiscal support to Bluum to process grant contracts, provide fiscal guidance to sub grantees, and coordinate audits and reporting with the Idaho Public Charter School Commission (PCSC). (see resume at Appendix B for finance expert Kurt Kargou).

**Idaho's Communities of Excellence**  
GEPA Section 427  
Submitted in Support of Bluum's Application for CSP Award to State Entities 2018 CFDA  
Number: 84.282A

Bluum, a Boise-based statewide nonprofit charter school support entity, is leading Idaho's **Communities of Excellence** federal CSP proposal. We are joined by Idaho's primary charter school authorizer the Idaho Public Charter School Commission. The Idaho State Board of Education, the J.A. and Kathryn Albertson Family Foundation and the nonprofit school facilities finance group Building Hope are the other consortium partners. Bluum, and its Idaho partners, are deeply committed to ensuring equitable access to, and participation in, the federally-assisted CSP program for students, teachers, and other program beneficiaries with special needs, in accordance with the principles outlined in § 427 of the General Education Provisions Act (GEPA).

Idaho's **Communities of Excellence** CSP project will work diligently to ensure fair and equitable access for every Idaho student, regardless of background, taking thoughtful steps to help potential program beneficiaries overcome any barriers that may arise related to, at a minimum, gender, race, national origin, color, disability, age and/or difficulties that may arise related to geographical location.

For example, experience and published research indicate that many Idaho families that could benefit from a public charter school in their community have limited awareness of the school's existence and/or limited access to meaningful information to help them better understand their public-school choice options. Bluum will widely disseminate all grant-related materials, application forms and assistance, including posting CSP-funded materials on its website, with access enabled to allow assistive computer devices to interpret the materials for

**Idaho's Communities of Excellence**

**GEPA Section 427**

Submitted in Support of Bluum's Application for CSP Award to State Entities 2018 CFDA  
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users. Bluum will have technical assistance, including paper hard copies, available for any interested party to apply for funding.

In addition, as indicated in the Program Objectives, Bluum is committed to expanding access to high quality charter schools for low-income students, at-risk students, and rural students. Bluum has conducted extensive research to better understand the barriers families may experience that identifies limited understanding of English, especially for parents and caregivers who may have recently immigrated, as a significant barrier, especially given Idaho's extensive agricultural industries.

Potential beneficiaries may face childcare challenges that prevent them from attending informational sessions about their available K-12 options. Consequently, CSP subgrantees will be required to include respective GEPA plans and implementation budget details related to providing onsite childcare options for potential beneficiaries, especially during information sessions (i.e. Open Houses and/or school tours for enrollment applications).

Idaho will require that each CSP sub-grantee develop and implement a detailed GEPA plan as part of their planning grant to ensure equitable access and participation in accordance with principles outlined in Section 427 of the General Education Provisions Act (GEPA).