



Insights from Philadelphia Charter Operators

Key Learnings and Recommendations

November 2024 Final Version



Framing



01

Elevate 215 engaged in an independent listening tour with charter school leaders to better understand the issue and identify actionable solutions.

02

Elevate 215 was identified as a third party that could both listen to charter school leaders from a place of trust, and present solutions to the school board and public in a constructive manner.

03

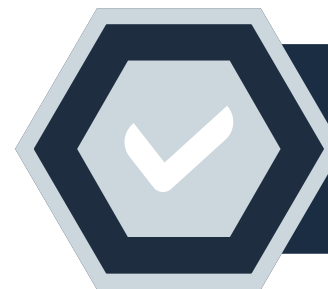
In order to ensure rigor and objectivity, Elevate 215 hired Grovider Learning and Evaluation (GLE), a local, independent, Black-LED research firm, to design the initiative and engage all 82 charter operators across the city.

GLE was also asked to provide an overview of recent reports on Philadelphia charter authorization, as well as resources and information about best practices for charter support and authorization nationally.

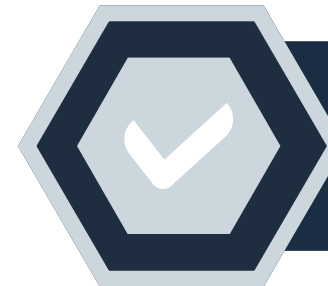
With this background in mind, the primary **OVERALL** goals Elevate 215 identified for this initiative include:

- To identify and understand pain points and areas for improvement in public charter sector management, collaboration, authorization, and evaluation from the view of public charter school operators.
- To identify a set of core recommendations that can move this work forward with a focus on solutions that create the best outcomes for Philadelphia students and their families.
- And to promote transparent and meaningful dialogue between charter operators and the local authorizing body moving forward.

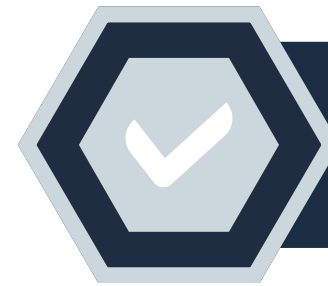
GLE Study Objectives



Assess Challenges and Opportunities: Provide insights into how operators experience Philadelphia's current charter authorization process, including pain points, bright spots, and opportunities for improvement.



Clarify the Vision: Identify and articulate how operators envision the role of the charter authorizer in Philadelphia's charter sector.



Advance Equity: Explore and recommend structures, systems, policies, and practices that can increase equity in the charter authorizing process.

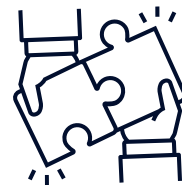
LETS GET STARTED

Study Methodology



01

Convened nine charter operators to support study design



02

Co-created learning questions, survey items, and focus group protocol



03

Released survey open April 12 - June 16



04

Hosted 5 opt-in focus groups with operators (June 2024)



05

Completed analysis of survey data (descriptive statistics)



06

Transcribed focus group recordings & performed inductive coding



07

Developed draft deck of findings aligned with study objectives

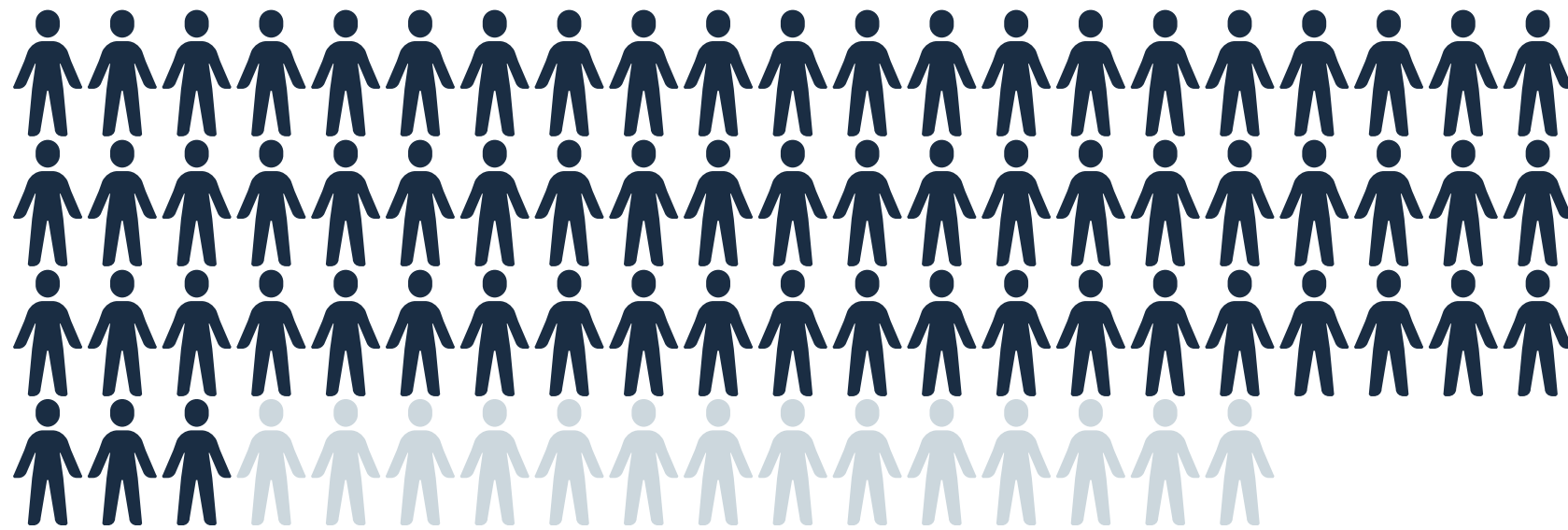


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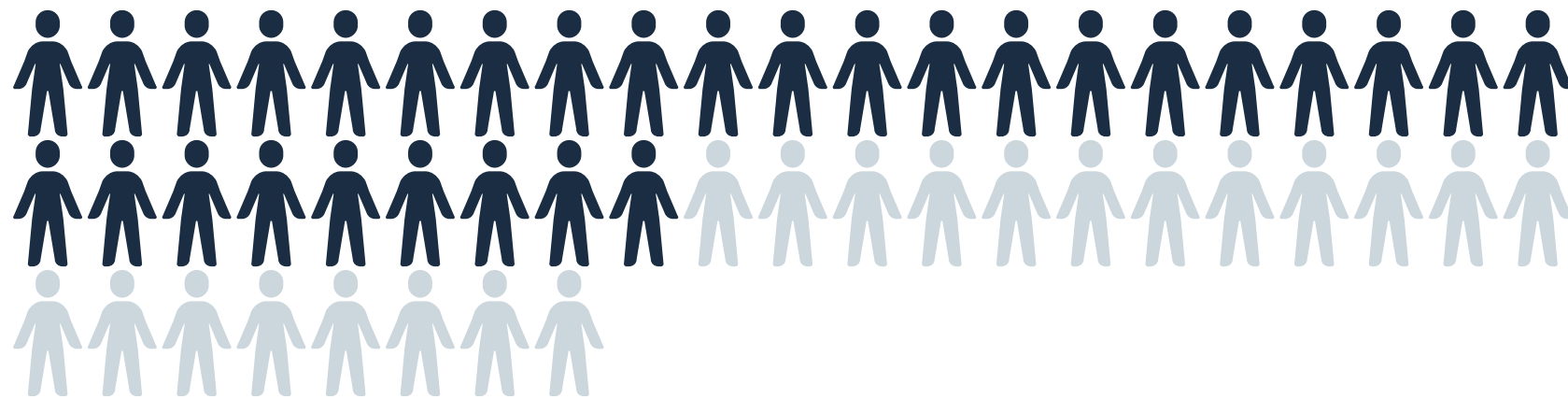
Hosted focus group with operator committee to review findings



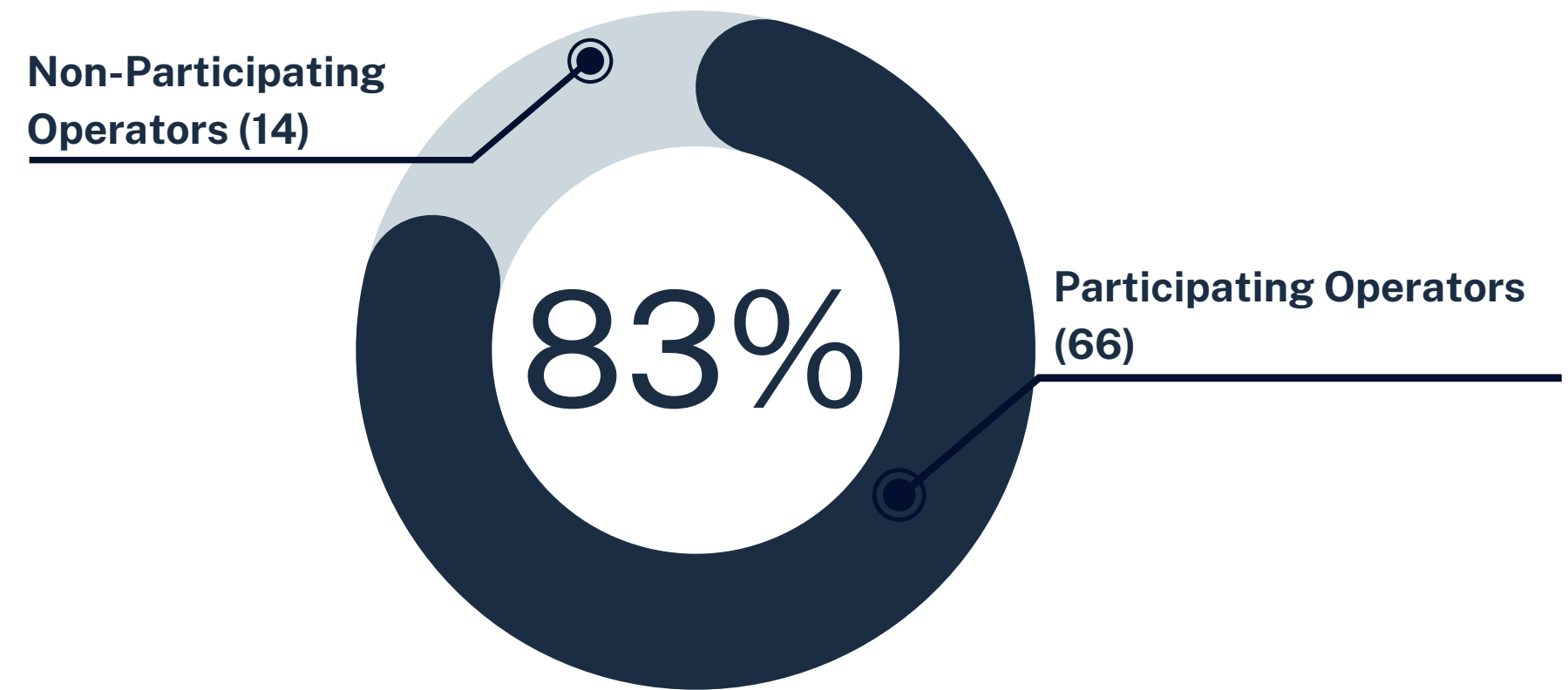
Participation Breakdown



66 of 80 Operators completed surveys



50 of 80 Operators completed both surveys and focus



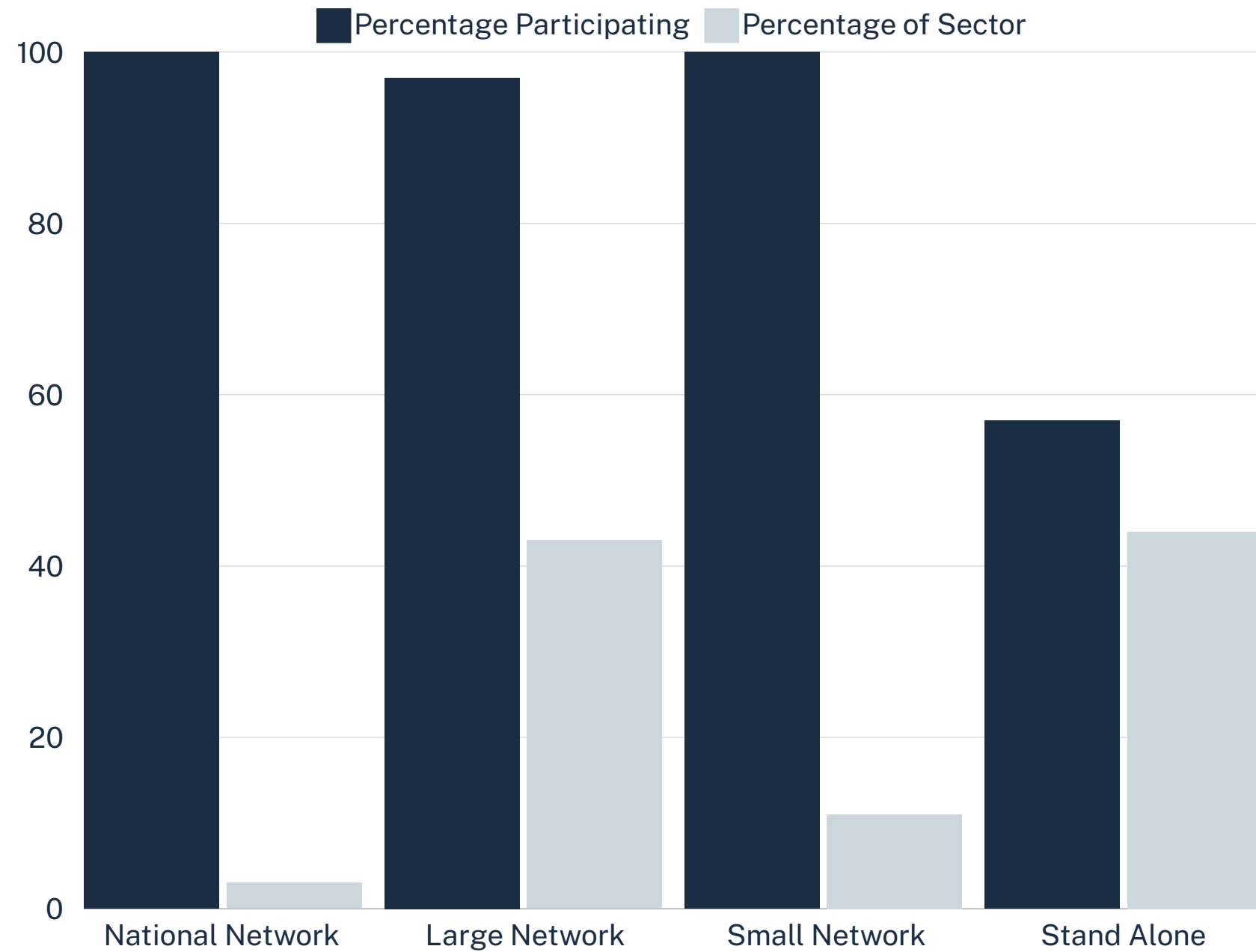
This represents 83% of the sector*

**Margin of error \pm 5.2% at a 95% confidence interval*

Participation Breakdown

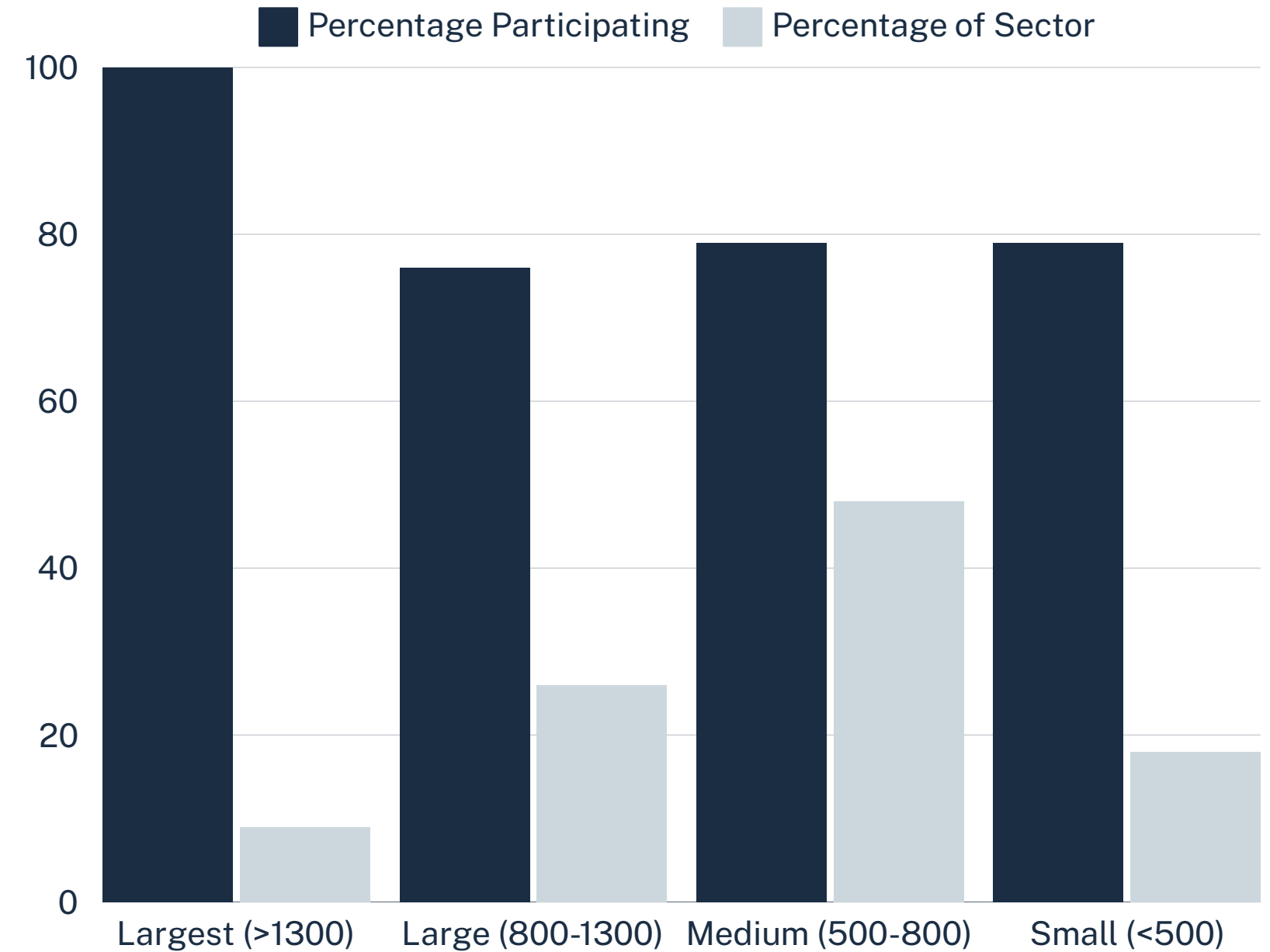


>50% of all operator types participated



By Type of Operator

By Size of LEA

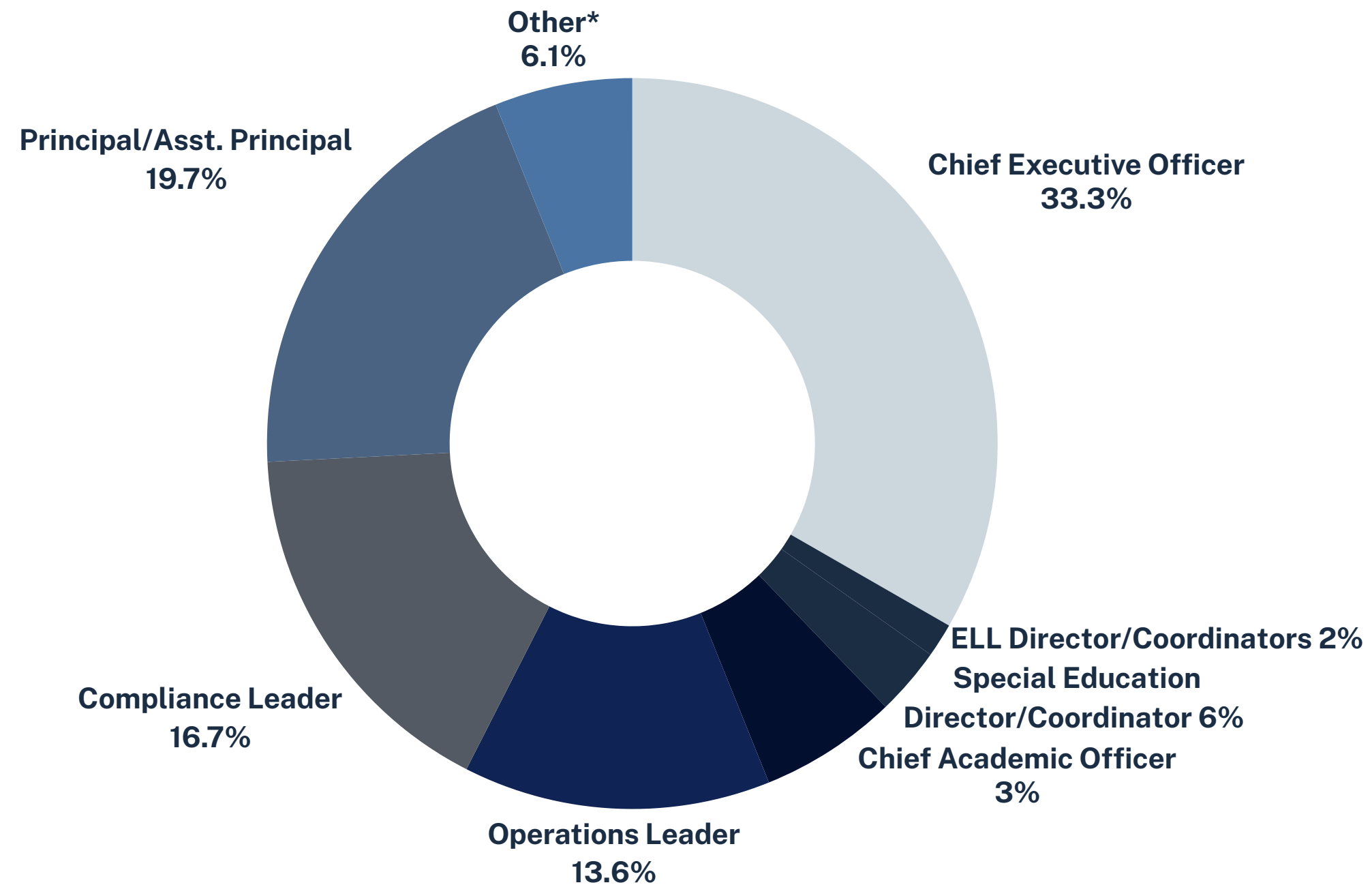


>75% all sized LEAs participated

Participant Profiles



- 89%** Have **interacted with the CSO** as part of the application and renewal process
- 75%** Have **submitted or prepared data** for renewals and authorizations to the CSO
- 72%** Have **prepared renewal applications** for their charter operator
- 68%** Have **helped school leaders** and teams **make sense of charter renewal** recommendations and decisions
- 38%** Have a role in **negotiating the contract** with the district



*Includes Director(s) of Finance, Culture, Strategic Initiatives

Participants spanned a range of roles and experiences with the authorizing process

WHAT DO OPERATORS ENVISION FOR THE SECTOR?

**“[The focus has to be] high quality
educational opportunities for public
school students.”**

~Focus Group Participant

For Operators, an Ideal Sector Prioritizes:*

High-Quality Educational Options: Provide more high-quality educational options for students, ensuring all children have access to excellent schools.

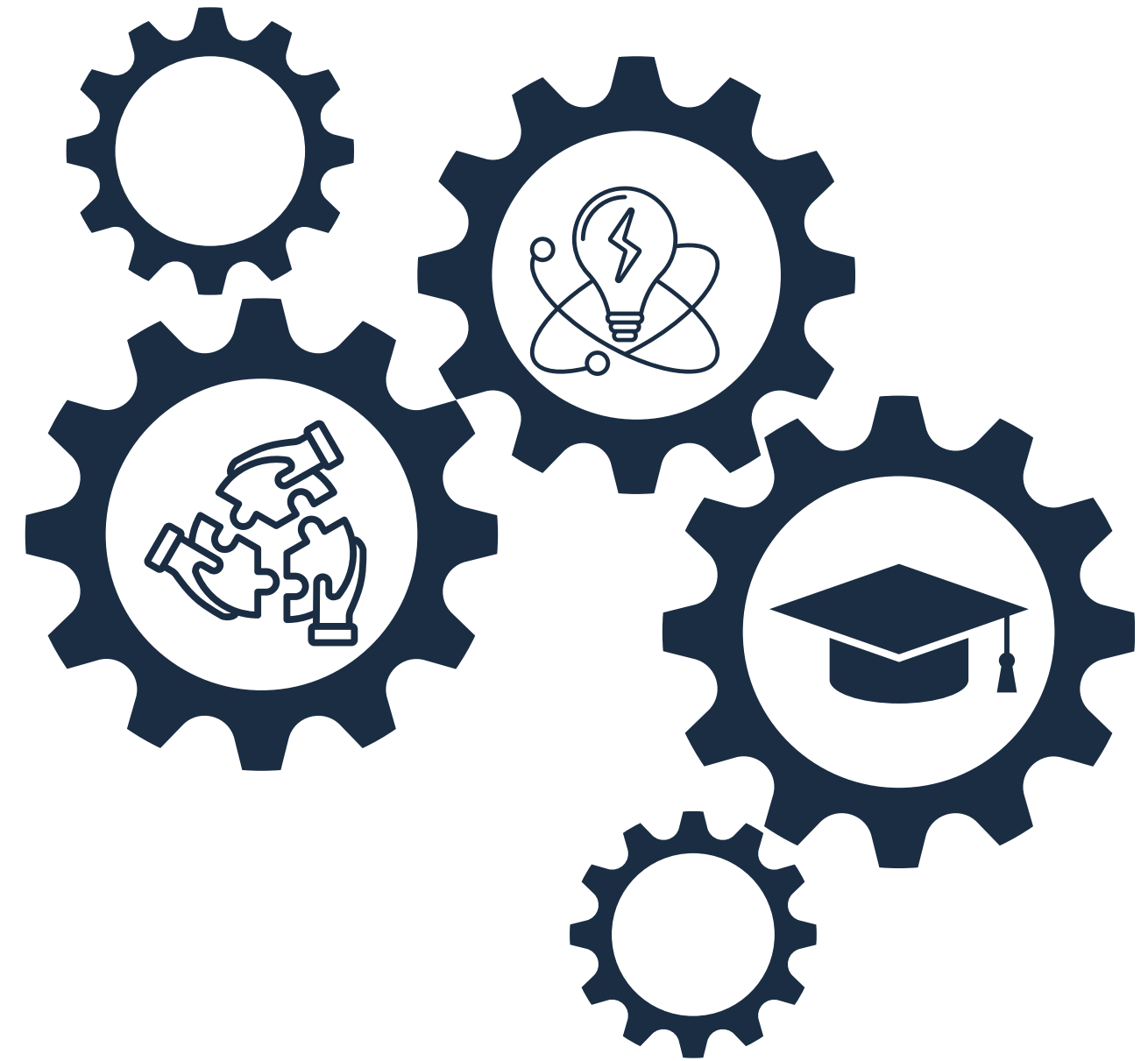
Dynamic and Innovative Education: Create a dynamic sector that fosters innovation and allows for continuous improvement through experimentation, expansion, and learning.

Collaboration Over Competition: Establish strong collaboration between charters and district schools to share practices, innovate and drive educational improvement.

Purposeful Existence: Ensure the charter sector serves a distinct purpose by addressing gaps as a part of an ecosystem that serves all students effectively.

Shared Commitment to Student Success: Work together to provide high-quality education for all students in Philadelphia, breaking down barriers and focusing on shared goals for student achievement.

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*Findings from focus group themes

Understanding Operators' Vision for the Sector in Their Own Words*...

"It's about improving performance, not just checking boxes. We need a shift towards understanding and supporting schools to improve."

"[We have to] build a ton of trust. I think, [we need to know] that [the CSO] is really rooting for us all to succeed."

“Coexist and borrow the best from one another....build some real trust!”

"[No more] us versus anyone. It's really just [about] all good schools for all kids....how do we make that happen?"

“[We should be] able to do more cross collaboration...using best practices that we have in our small settings [to help each other].”

**WHAT ARE OPERATORS'
CURRENT EXPERIENCES
WITH AUTHORIZING IN THE
SECTOR?**

“I didn't think that so much [was] going to be... at the whim of the school board.”

~Focus Group Participant

High-Level Findings: Grows & Glows



- 01** Across all operator types, respondents noted the following pain points: inconsistent practices, the charter school performance framework, shifting expectations, duplication of effort, and lack of differentiation.
- 02** The most frequent words associated with the current process included: inconsistent, conflict of interest, not transparent, punitive, and subjective.
- 03** Very few respondents (4%) agree that SDP is the most appropriate charter authorizer for the City of Philadelphia.
- 04** Respondents appreciate the CSO's most recent focus on customer service.
- 05** Respondents agree that opportunities to submit materials for feedback has been helpful.



Understanding Operators' Experiences in One Word*....



Improvement-driven
Not-transparent
Disorganized Punitive Evaluative
Conflict-of-interest
Inconsistent
Data-informed
Subjective

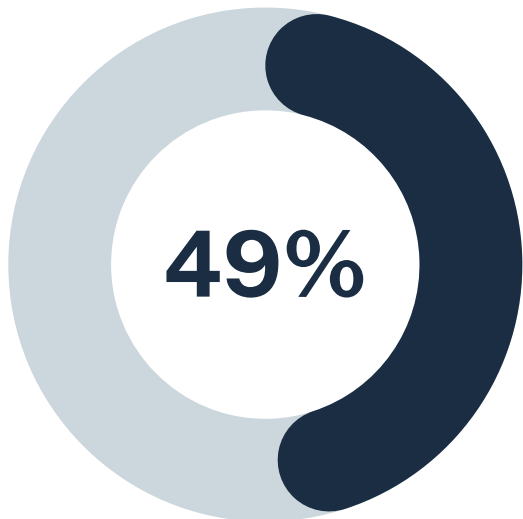
Reliable Instructive Appropriate

*Findings from the survey.
Larger words were selected
more frequently.



INCONSISTENT PRACTICES

“It’s different every single year, and even in the year, with every single charter school. If you look at the ACE reports for the schools that were up for renewal this year versus the schools that were up for renewal last year [there are] discrepancies between what was written up...I just find it very... inconsistent. They kind of just [can] do what they want, and it just depends on who they’re talking to and the school they’re talking to.”



CHARTER SCHOOL PERFORMANCE FRAMEWORK

“[It seems like] the framework was developed to make a case against charters and show how they’re maybe not performing as well.”

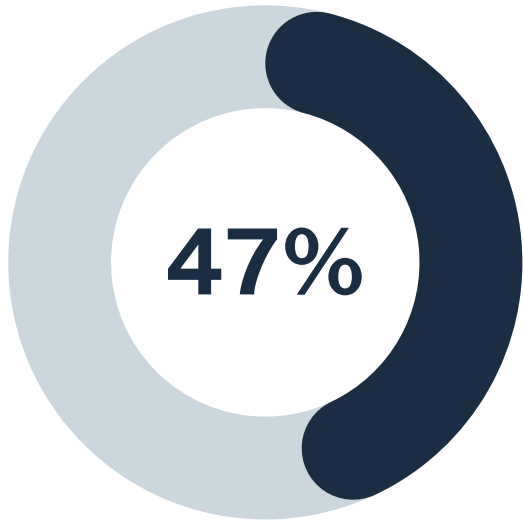
“[We need] a framework that works with schools to say, ‘Okay, here [are] the areas of strength.. areas that need improvement, and here’s how we can support you,’ that would be a much better model than the compliance checklist.”



Most Frequently Selected Pain Points*

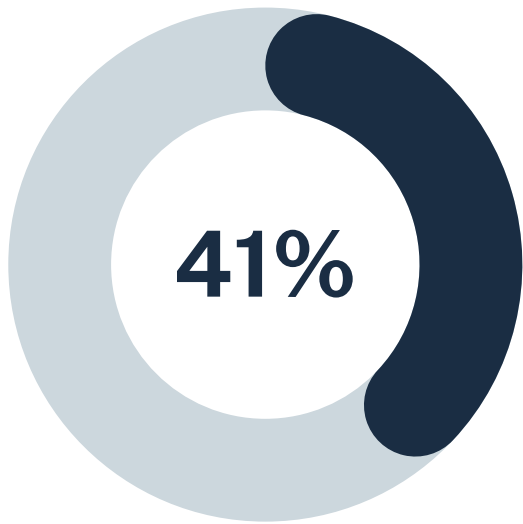
“Is [the framework] universally applied in the same way to all public schools? [That is] really what I think is not transparent, and also potentially punitive or unfair.”

*Survey respondents were asked to select 5 pain points from a list of 15.



SHIFTING EXPECTATIONS

“Even though the framework has been in place since 2012, it does feel like it's changed a lot in terms of what they're looking for, how the site visits go, what the protocols are, etc. It just feels like your target [goes] from point A to point Q [and] you're not brought along for the process. The goal is over here. Now we're playing it over here. We were playing soccer. Now we're playing basketball so that feels kind of crazy.”



DUPLICATION OF EFFORT

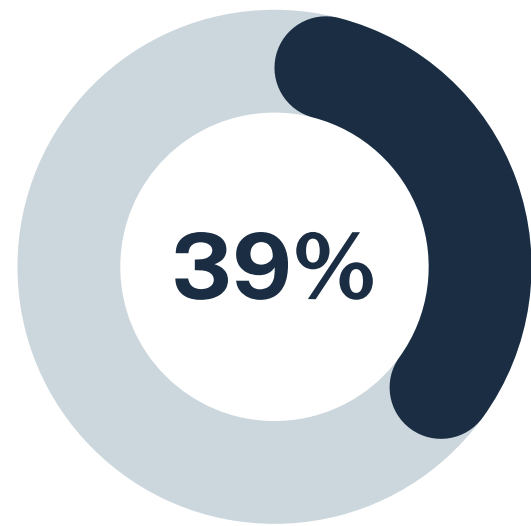
“I don't think in having conversations with the Charter School Office they have a full appreciation for the data that the State and the Feds collect, or even the Bureau of Special Education. And so there's massive duplication of requests without an appreciation for the burden that place(s) on school-based staff and the trade-offs that has in terms of focusing on student learning.”

Most Frequently Selected Pain Points*

“I'm not really sure what the goal is... you're asking people to do triage instead of actually, really go deep. And so I'm just not really clear on what the purpose of some of [the CSO actions] are....I don't know what the end goal is.”

*Survey respondents were asked to select 5 pain points from a list of 15.

Most Frequently Selected Pain Points*



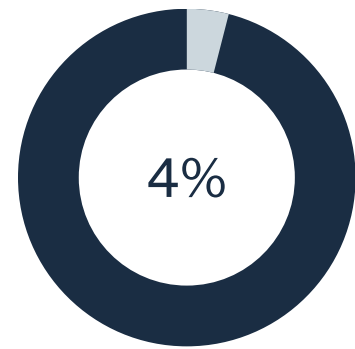
LACK OF DIFFERENTIATION

“The lack of differentiation stands out because the spirit of [the Charter School Law], was the innovation. Yet at the convening meeting last week, they gave us a packet that said that every one of our policies has to be written exactly [the same] way. My secretary took the time to take that packet. It's literally the school district's policies, so what they want is us to just take all of their policies and put our names on.”

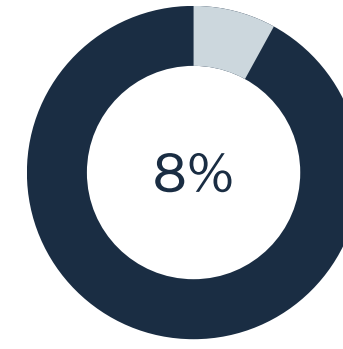
“**[Differentiation looks like] acknowledging the difference between a school in startup versus a school in year 20...So that...if you're gonna take all the time to give someone a charter [the] goal shouldn't be to attack them for 3 years, to hit all the compliance stuff. It should be..an intentional runway to build a successful operation.**”

*Survey respondents were asked to select 5 pain points from a list of 15.

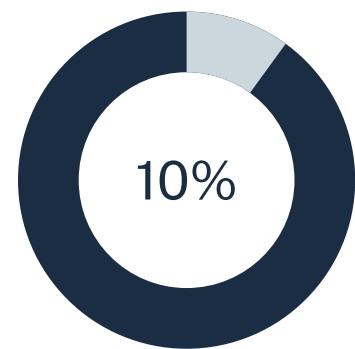
<15% of Survey Respondents Across Operator Types Agree:



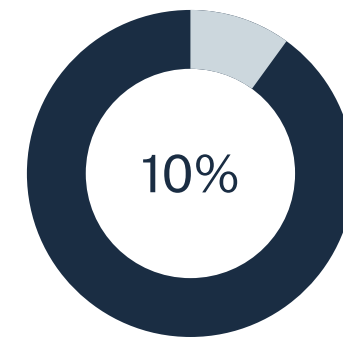
SDP is the most appropriate charter authorizer for the City of Philadelphia.



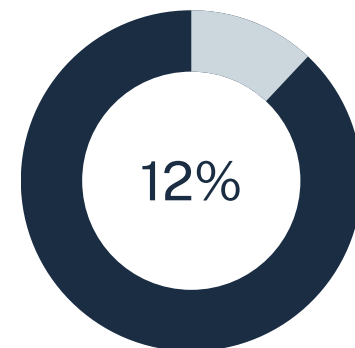
The charter authorizing process is equitable.



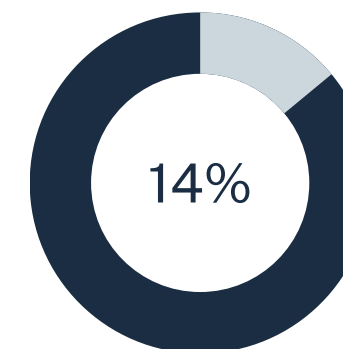
The charter authorizing process is fair.



The charter authorizing process in Philadelphia is easy to understand.



The charter authorizing process is transparent.



I trust the charter authorization process and the recommendations that result.

In addition, Small, National, and Large Networks agreed that:

- Comparison data used to evaluate charter schools are NOT fair and reasonable.*
- The charter authorization process is NOT based on the use of valid and reliable tools.*

Pain Points That Cause Operators to Avoid Signing Agreements*:



Weaponization of Conditions: Conditions in charter agreements are perceived as being weaponized, leading to reluctance to sign.



Unclear Conditions: Decisions not to sign are driven by the belief that the agreements are not in the best interest of the school, especially when there are unexplained or seemingly arbitrary conditions.



Transparency Issues: Operators believe the lack of transparency in the process or changes without notice nullifies charter agreements and conditions.



Inequitable Terms: Some operators believe that the terms of the charter agreements are inequitable or unjust, specifically due to abrupt and unexplained changes in the framework



Lack of Fair Negotiation: Agreements are presented as final with little room for negotiation or engagement regarding appropriate terms.

*Themes from focus group data .

Additional Pain Points Identified During Focus Groups



Politics & Conflict of Interest: The CSO being a department at SDP presents a conflict; the board's political agenda and ability to overturn recommendations is disruptive



Expertise Needed: CSO appears to lack charter school expertise, complicating issues



ACE Process/Reporting: Helpful but increasingly burdensome; question frequent submissions, not helpful at renewal



Equity Issues: Disparate treatment and a lack of equity in the application of the framework and conditions, current approach did not account for the unique challenges faced by smaller schools



Contextual Factors: Unique missions of different schools are not accounted for, there's a need to consider multiple data points, including growth, safety, and culture, favors compliance over quality and hinders innovation

"It felt like a clinical process... not driving quality improvement but satisfying a specific formula."

"The authorizing process requires drastic change if it is to be used to improve education. The focus of the existing process is closure."

"[They] need to own what they're doing currently and take action to stop the racist and biased practices."

"We don't get to speak to the ultimate decision maker, and so [the board] only hears from the CSO,, when they disagree it's almost impossible to understand what's motivating that except politics."

"The CSO has attempted to set up a bureaucratic process that treats everybody the same and makes data-based decisions. Yet, they deny the subjectivity and lack of transparency that their own system actually has."

Top 6 Authorizing Bright Spots*



SOME KNOWLEDGEABLE & SUPPORTIVE STAFF

Staff at CSO Who See Their Role as Support

“I think they also did some changes in hiring practices. [One new hire] was previously CEO of a school. She actually understands how charters run, and I think that hiring people that are now advocates and looking at mission driven conversations [is helpful].”



CUSTOMER SERVICE

Increase in Positive and Supportive Interactions

“I will say that everyone at the CSO last year was very helpful. I've felt more comfortable reaching out in the last 2 years to help navigate the system with them than I have in the past, so I do think [they have] paid attention to having better customer service.”



INQUIRY-BASED PROCESS

CSO Using Inquiry to Help Operators Improve

“I can see places where we have improved what we do because of [questions in the renewal process] like, I'm glad for the questions. It's been helpful in some ways.”

*Themes from focus group data .

Top 6 Authorizing Bright Spots*



COLLABORATION & RECOGNITION

Collaboration with District Performance Office & Opportunities to Share Practice

“One thing that has happened in our building [we adopted new] literacy curriculum. [The CSO] did seek us out, and have brought several big groups of educators from lots of buildings out to see the program in action.”



OPPORTUNITIES TO GET FEEDBACK

Supportive engagement with the CSO to fine tune materials before submission

“They started early submission [where they] hey give you the chance to correct [things], that was good. I like that.”



SINGLE POINT OF CONTACT

Having a Designated Single Point of Contact

“I do like having one contact person before I [didn't have that] contact person. I feel like I can reach out any time.”

*Themes from focus group data .

ACCORDING TO OPERATORS, WHAT SHOULD AUTHORIZERS DO?

“I think it's important for them to decide exactly what they need from us, make that very clear in advance, and be consistent. What would happen if they also saw themselves as a conduit for making change, for building connections and sharing strengths...”

~Focus Group Participant

High-Level Findings: Role of an HQ Authorizer



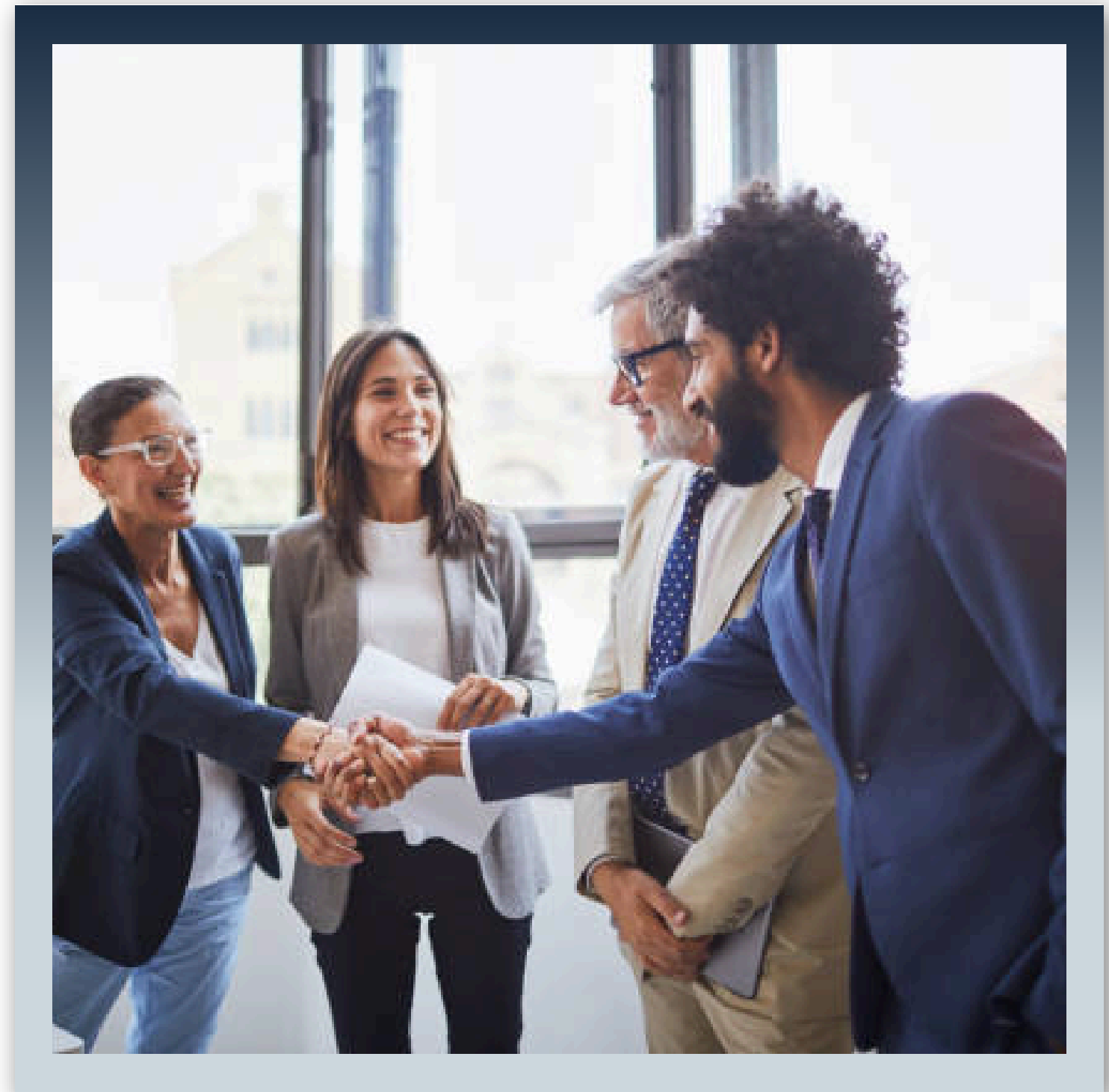
Respondents believe that a HQ authorizer should prioritize equity, fairness, and transparency.



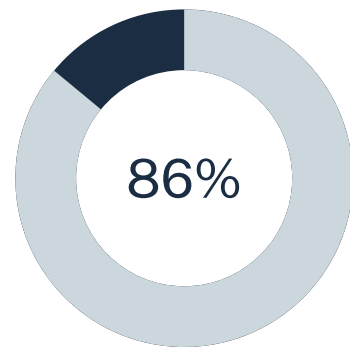
Across all operators, respondents noted that a HQ authorizer champions innovation, provides support to increase quality in the sector, and sets and upholds standards aligned with federal and state laws.



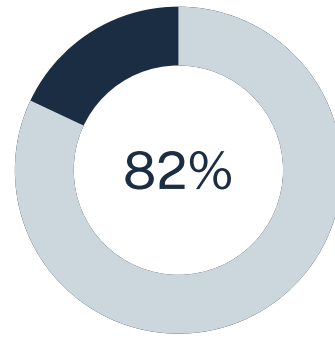
Respondents suggested that a HQ authorizer ensures schools meet obligations, focuses on governance and transparency, co-creates performance targets, and prioritizes performance over processes.



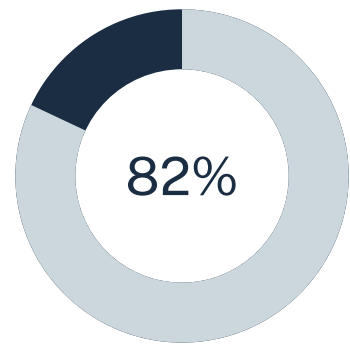
>75% of Survey Respondents Across Types Agree:



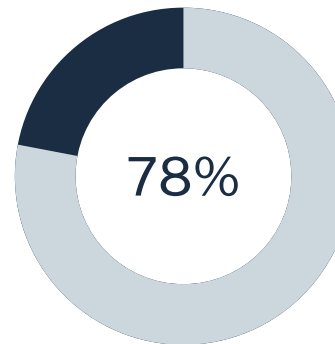
Authorizers should support charters to reach standards that improve opportunities for all students.



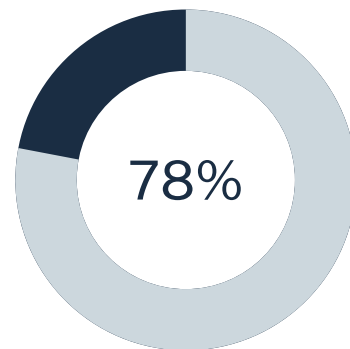
Priority deadlines for compliance submissions are helpful.



Charters should be given an appropriate learning curve from startup to fully operating.



Recommendations shared for renewal with conditions should align with school/sector vision.



Philadelphia would benefit from a neutral/independent authorizer not affiliated with a local school district.

In addition, National and Large Networks agreed that:

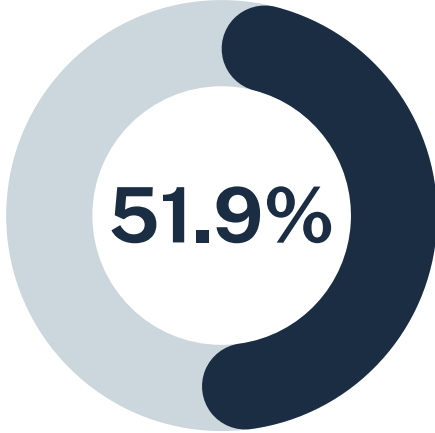
- *SDP should compare charters and neighborhood schools with similar missions, size, and student populations.*
- *Five years is an appropriate timeline for authorizations.*

Roles an HQ Authorizer Should Play According to Survey Selections:



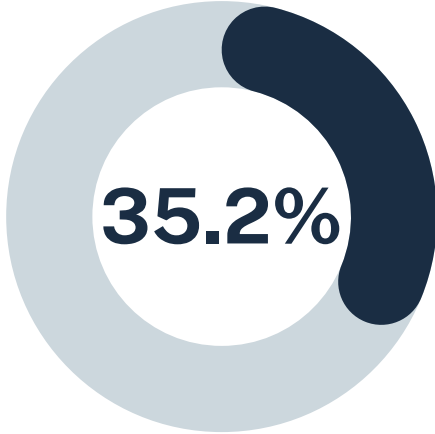
MOST SELECTED

Committing to equity, fairness, and transparency in the implementation/execution of charter authorizing



SECOND MOST

Ensuring operators have flexibility to innovate and meet student needs

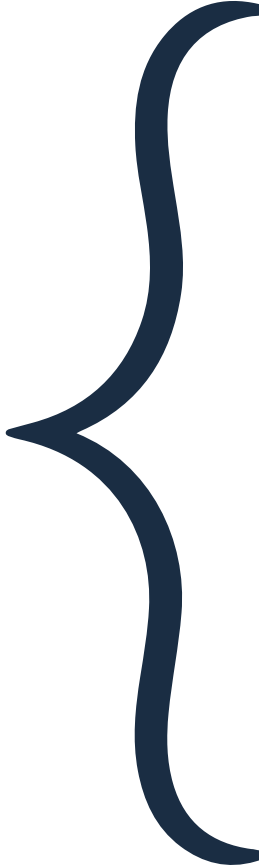


THIRD MOST

Facilitating the success of charters within the sector through ongoing & dedicated support



TRUE ACROSS ALL OPERATOR TYPES



SMALL NETWORK/STAND ALONE: Addressing student and public interests

NATIONAL NETWORK: Building accountability measures to ensure the effectiveness of the sector

Roles of an HQ Authorizer

“A charter authorizer operating at kind of an optimal level would.... ensure that we’re approving high-quality schools.”

“I think the most successful charter environments have authorizers who are really viewed as collaborative partners with the charter schools to ensure compliance.”

“The way the framework [is] set up.... comparing us to peer schools and needing to outperform the district..does not represent a coherent vision...the authorizer should [drive] the charter sector and its role in the city.”

“A high-quality authorizer goes beyond compliance and actually betters the entire system because they are finding, supporting, and expanding Things that work to make the entire system better.”

Survey Respondents Ranked the Potential Roles of an HQ Authorizer*



TOP FIVE COMPLIANCE ROLES

- 1 Holds schools accountable for fulfilling fundamental public education obligations to all students
- 2 Holds schools accountable for fulfilling fundamental obligations to the public, including governance, stewardship of public funds, and operational transparency
- 3 Ensuring compliance decisions and guidance account for the context in which schools operate
- 4 Partners with the sector to co-create performance targets
- 5 Maintains high standards for the schools it authorizes

TOP FIVE FUNCTIONAL ROLES

- 1 Ensures clarity, consistency, equity, and transparency in authorizing policies, practices, and decisions
- 2 Makes the well-being and interests of students the fundamental value informing all the authorizer's actions and decision
- 3 Assumes responsibility for facilitating a thriving charter sector
- 4 Effectively cultivates charter schools that meet identified educational and community aspirations
- 5 Prioritizes ethical conduct, efficient public stewardship, and compliance with applicable laws and regulations

*Survey respondents were asked to rank a set of 10 potential compliance and 10 functional roles.

What Role Should an HQ Authorizer Play With Students & Families?*



“Support the success of the parents' choice school.”

“The authorizer should promote transparency in school performance, operations, and financial management so families can make informed choices”

“Monitor and enforce policies that promote equitable access to charter schools for all students, including those from disadvantaged backgrounds or with special needs.”

“Serve as a resource to help families understand their rights as well as the process of applying to charters.”

“Support innovative charter schools that address unmet or underserved needs.”

“Truly welcome family input and remove barriers that families experience when attempting to communicate with the SDP and CSO.”

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*Qualitative data from an OE survey question.

What Role Should an HQ Authorizer Play With the School District?*



"The authorizer can encourage collaboration between charter schools and traditional public schools within the district, fostering a mutually beneficial relationship."

"If and when the authorizer closes a charter school, they should ensure students can smoothly transition into better options."

"Use innovations of charter schools to prompt changes in district schools."

Manage the financial implications of charter schools on the district."

Clearly communicate the progress students are making at each school on a variety of measurements."

What Role Should an HQ Authorizer Play With Schools?*



"Ensure the success of the school via targeted support and development."

"The authorizer should grant charter schools the autonomy they need to implement their educational models while providing oversight to ensure accountability and compliance."

"Curating a platform for schools to meet, collaborate and share best practices and innovations."

"Provide constructive feedback and opportunities for improvement."

"Provide clear guidelines and expectations throughout their renewal terms."

"Foster environments that directly support ALL students, especially those most marginalized."

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*Qualitative data from an OE survey question.



**WHAT WOULD HQ
AUTHORIZING LOOK LIKE IN
PHILADELPHIA?**

“Why are we not allowed to submit our policies and documentation and [get] clear feedback? then if we [legitimately] correct it with a board meeting or a clerical change and resubmit it, Why would that not be sufficient to meet the standard? we should be able to submit everything ahead of time, if they find issues, We have a collaborative meeting, we address them, and move forward. we're happy to fix the issues that they bring up. That's not the concern. the process should involve trust.”

~Focus Group Participant

High-Level Findings: Making Change in Philadelphia



Respondents believe that **academic progress, financial health, and compliance** are the most important factors for renewal.



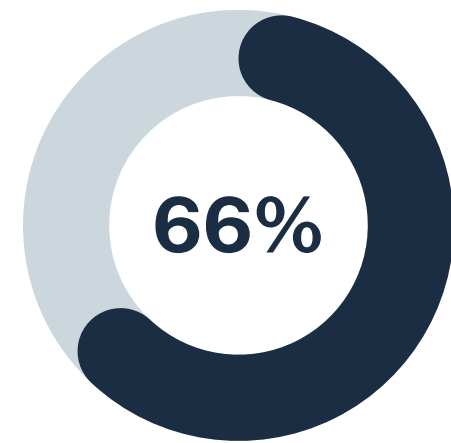
Operators across types in focus groups and survey responses shared that **academic targets should be co-constructed** in partnership with the authorizer.



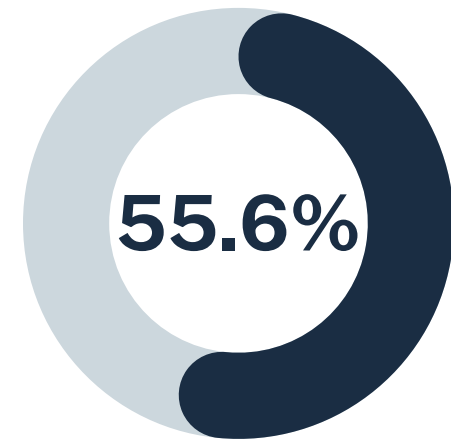
Respondents noted that the **authorization process should** be grounded in charter school law with a **focus on innovation** and **changed with advanced notice** only when laws are changed.



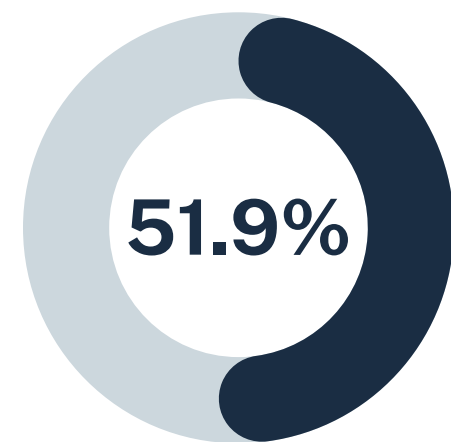
What Considerations Should be Used for Renewal Decisions?*



Most Selected
COMPLIANCE WITH STATE AND FEDERAL REGULATIONS



Second Most Selected
FINANCIAL HEALTH



Third Most Selected
ACADEMIC DATA



SMALL NETWORK: Financial Health | Compliance with State and Federal Requirements | Academic Data

STAND ALONE: Compliance with State and Federal Requirements | Academic Data | Financial Health

NATIONAL NETWORK: Financial Health | [Family Feedback](#) | Academic Data |

LARGE NETWORK: Compliance with State and Federal Requirements | Financial Health | Academic Data

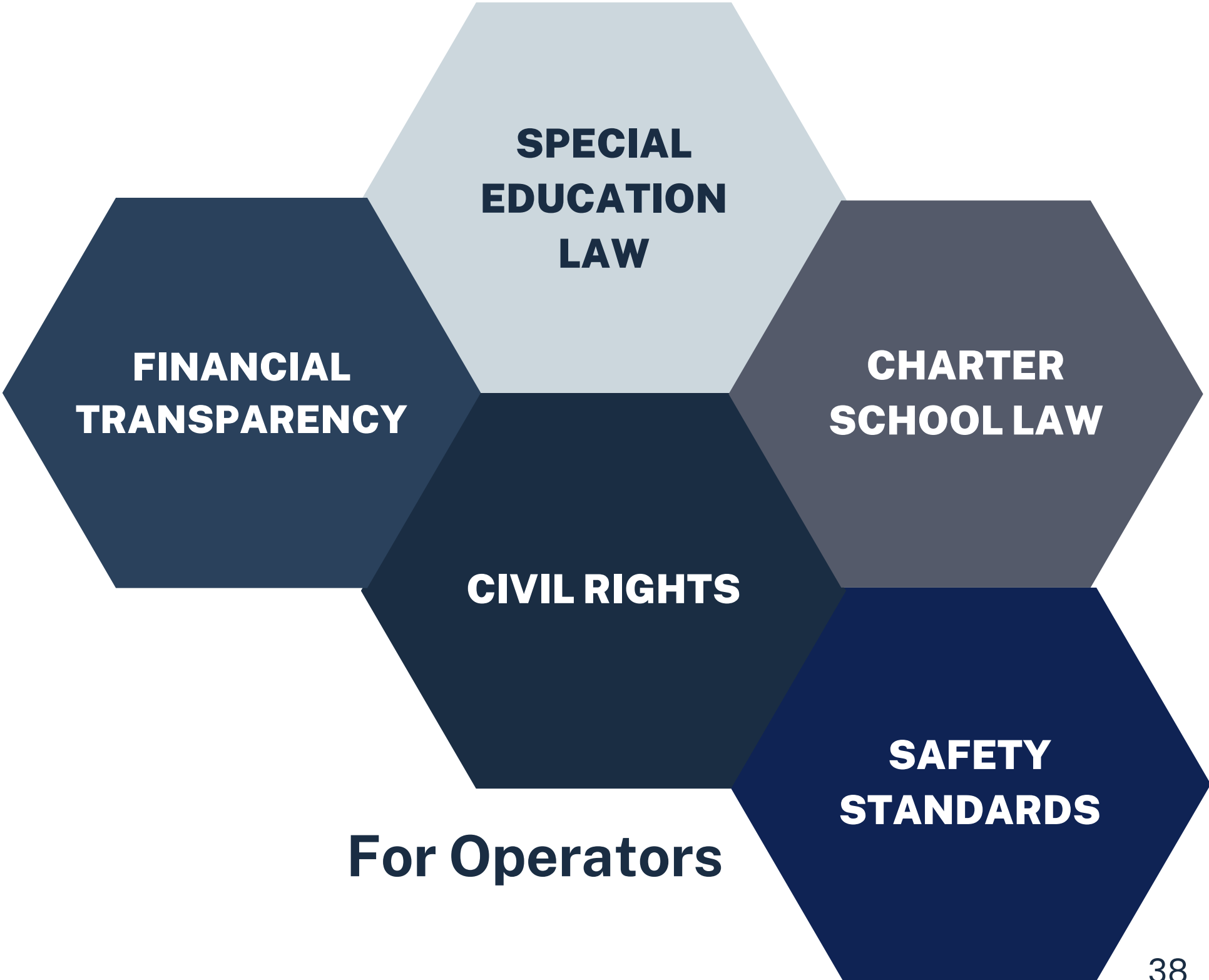
How Operators Define Compliance with State & Federal Regulations



For Authorizer



For Operators



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How Operators Define Financial Health



REGULATORY COMPLIANCE AND TRANSPARENCY

Meeting state and federal financial requirements + clean annual audits



THOUGHTFUL FINANCIAL DECISION MAKING

Prioritizing sustainability, adequate compensation, and operational integrity.



ACKNOWLEDGE PHYSICAL PLANT SPENDING

Allocation for building maintenance and repairs should be considered part of the financial health evaluation

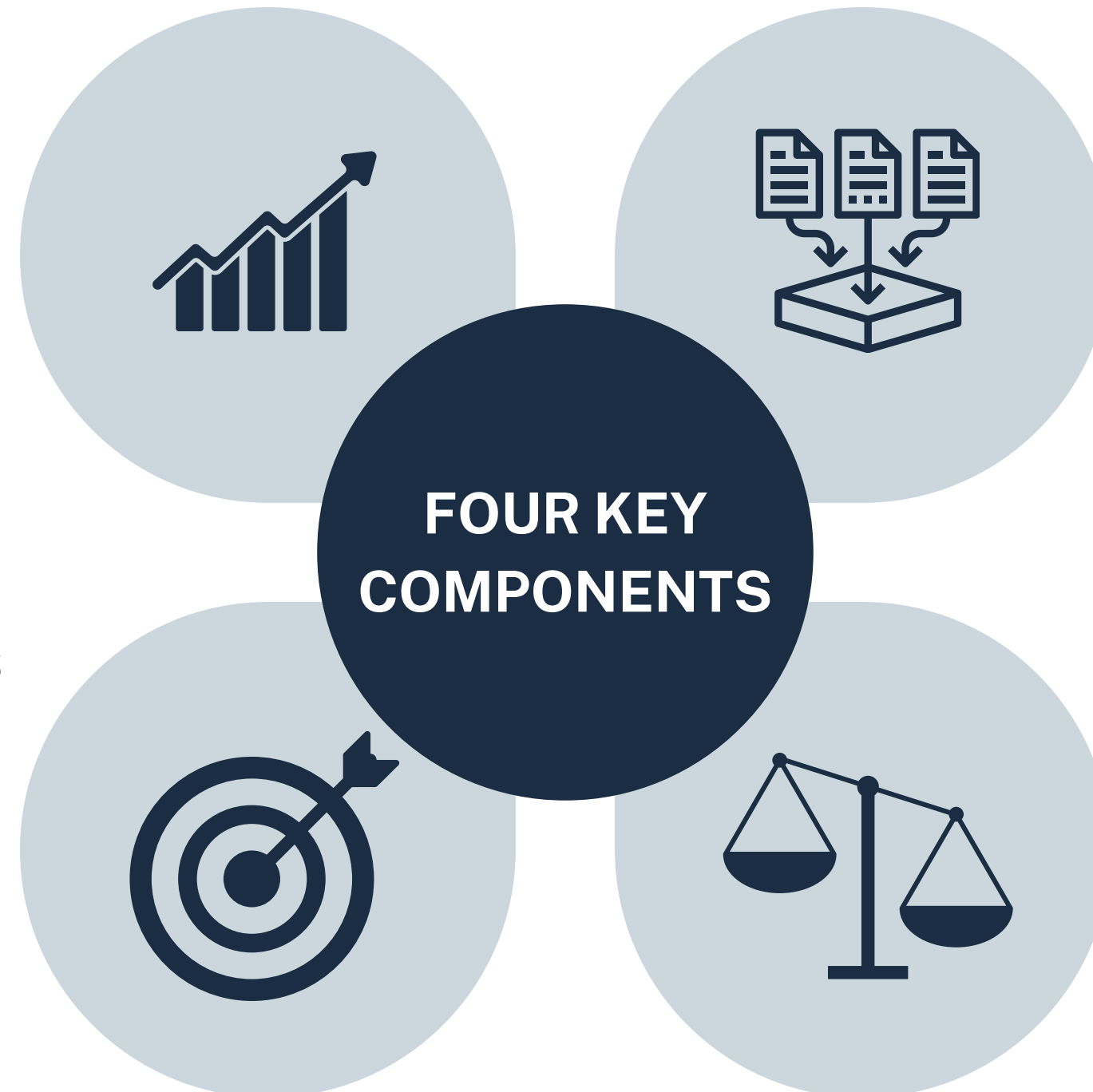
HOW OPERATORS DEFINE: ACADEMIC DATA

PRIORITIZE GROWTH

Academic growth should be emphasized over mere proficiency. Focus on improvements in student learning outcomes over time

CO-CONSTRUCTED TARGETS

The evaluation process should incorporate a variety of metrics developed in collaboration with the authorizer and the schools, tailored to their unique needs and goals



DIVERSE DATA SOURCES

Using various data sources(local and state assessments, input from school staff, and standardized tests), to understand student progress and school performance

APPROPRIATE COMPARISONS

Charter schools should be compared to their neighborhood counterparts to highlight any significant performance discrepancies

HOW CAN THE AUTHORIZING PROCESS IN PHIALDELPHIA ADVANCE EQUITY ?

“ [Why can’t] all the schools [be] treated the same in the negotiations process...Like if, [Another operator] gets better conditions, can you amend our charter to match theirs? [that might make] smaller folks feel better about the process.”

~Focus Group Participant

High-Level Findings: Addressing Equity



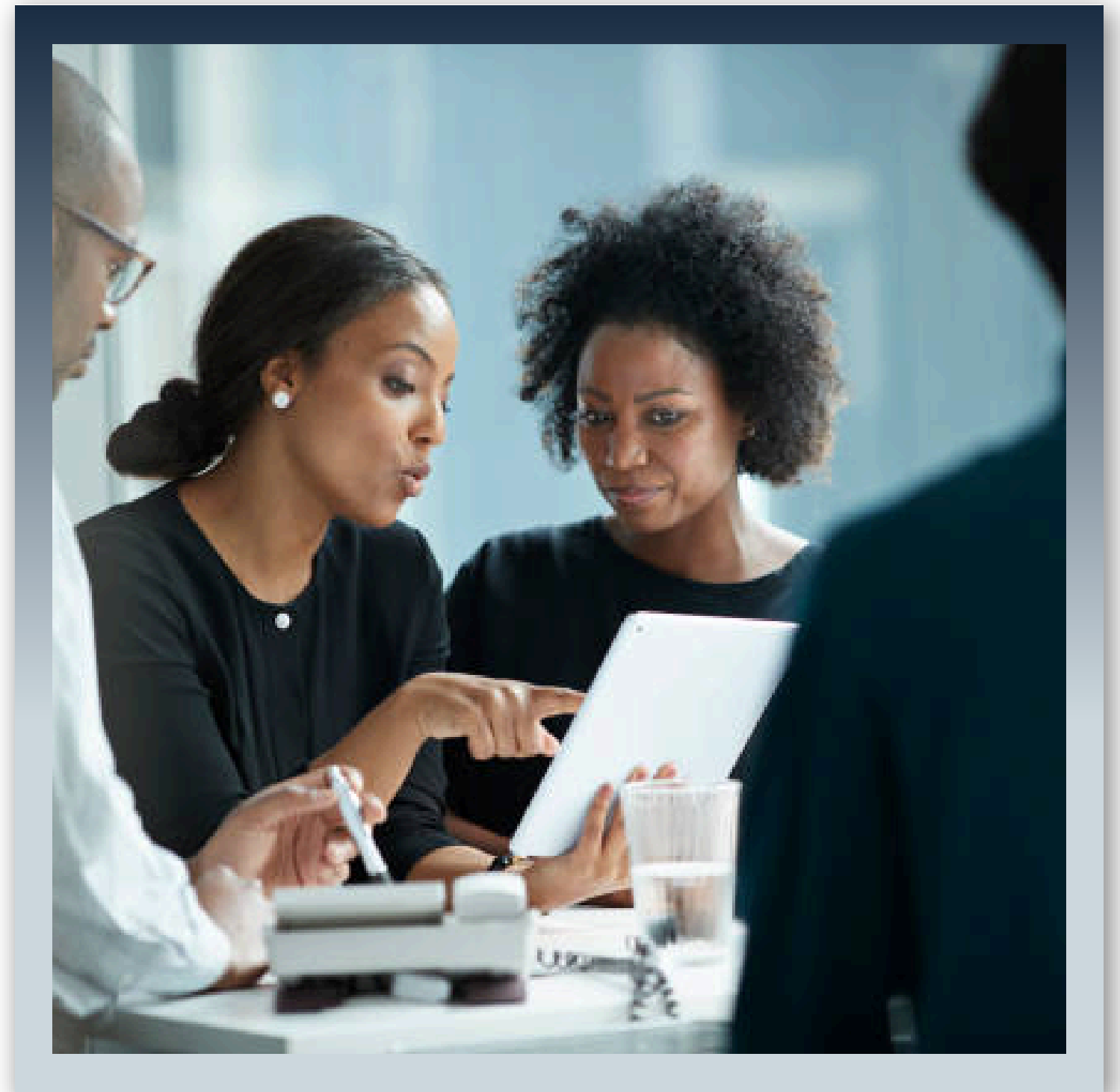
Across operator types, respondents noted **equity concerns** that included **a lack of attention to systemic racism, unfair comparisons, inconsistent expectations, unfair burdens, and ambiguous decisions.**



Respondents believed that authorizers should **publish clear guidelines, streamline data requests, and allow operators to submit supplemental data.**



Respondents suggested that equity could be advanced through an **instructive, collaborative approach** that **prioritizes differentiation, a focus on growth, extended renewal terms, and external audits to assess equity** and the effectiveness of the process.



Operators' Equity Concerns*



LACK OF ATTENTION TO SYSTEMIC RACISM

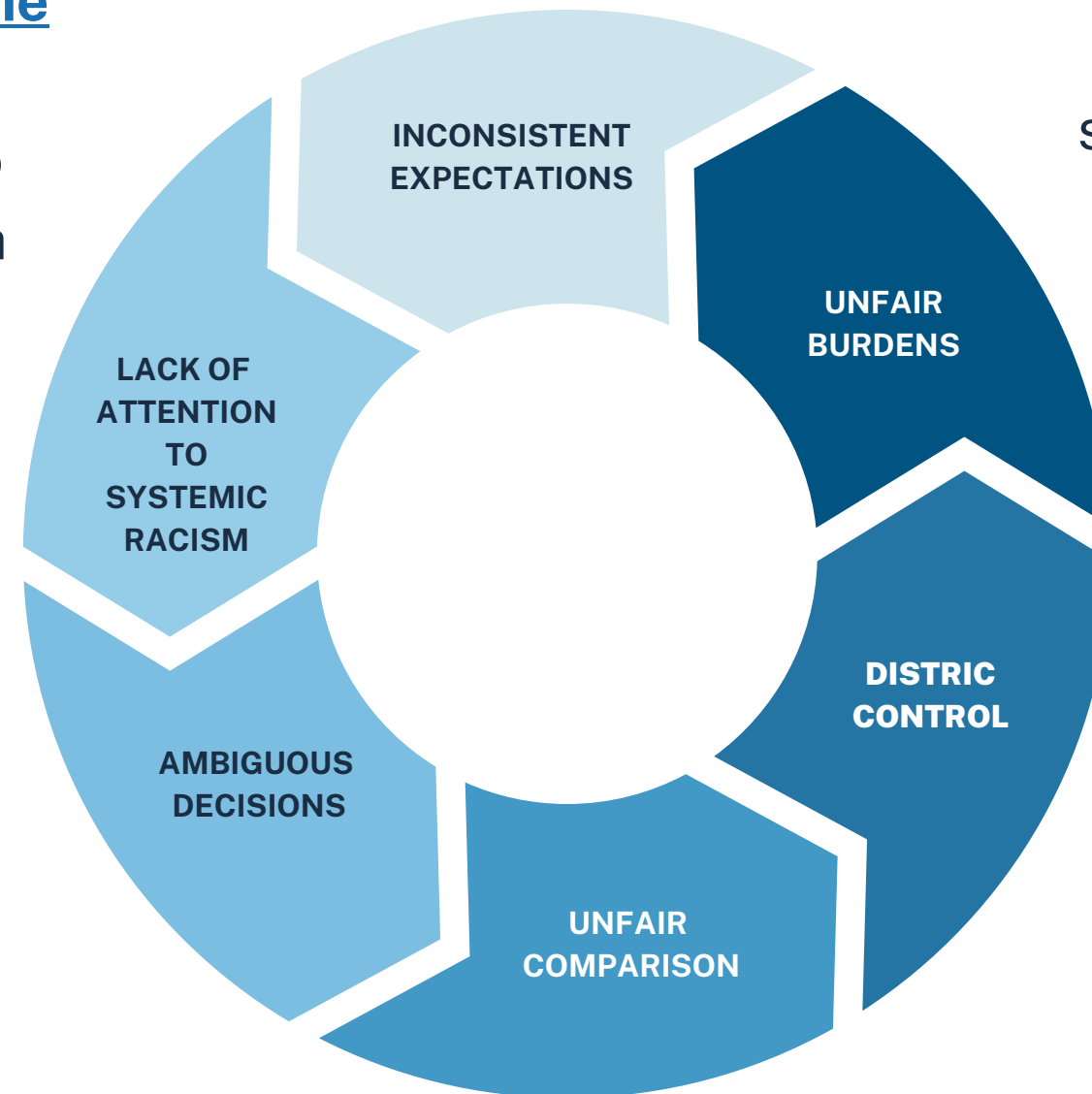
"Racial makeup is never factored into the similar schools list. we know that African American students suffer due to bias, trauma, and discrimination at much higher rates."

AMBIGUOUS DECISIONS

"We need transparency around how decisions are made and what drives those decisions. These conversations before the board meetings occur in a back room."

UNFAIR COMPARISONS

"Comparing us to other schools without considering our context is unfair and unhelpful. I don't even understand how they [create] the comparisons."



INCONSISTENT EXPECTATIONS

"At times it appears that charter schools are held to a higher bar than SDP schools, specifically for the compliance requirements. We get dinged for one thing!"

UNFAIR BURDENS

"I think it's hard sometimes for there to be equity when...you have to explain your job to the person...overseeing you. I [also] think a lot of schools don't have the capacity to fulfill all the requests of the Charter Schools office...not everybody can have a person or multiple people dedicated to fulfilling their requests."

DISTRICT CONTROL

"I don't think there's any type of equity unless [authorizing] leaves the school district to be completely honest."

gle

Most Selected Strategies to Affect Change



- 4 Ensuring authorizers have a comprehensive understanding of the intricacies of operating a charter
- 3 Clear and transparent published guidelines
- 2 Streamlining data collection to reduce redundancies
- 1 Accepting and trusting schools to submit supplemental data in order to provide a more well-rounded picture of performance



65% of survey responses identified these as key strategies.

- **Appropriate resources and guidance aligned to established criteria (stand alone)**
- **Establishing renewal criteria at the beginning of a cohort (national network)**

Operator Recommendations: Management Practices



Implement Regular External Audits



Increase Direct Engagement with Schools



Regularly Convene Operators



Prioritize Growth and Continuous Improvement



Adopt a Collaborative Approach to School Improvement



Ensure Evaluators Have Relevant School-Based Experience



Enhance Transparency in Decision Making



*Taken from focus group data

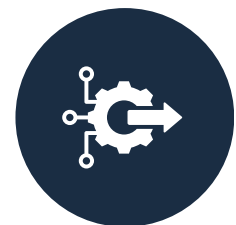
Operator Recommendations: Improvements to Authorizing Practices



Maintain Some Standardized Criteria While Allowing for Adjustments Based on Unique School Contexts



Establish a Neutral Oversight Body



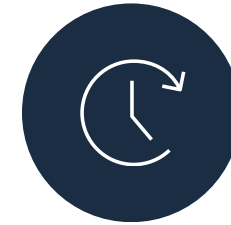
Streamline the Renewal Process



Review Processes Alongside Charter Law



Address Equity Concerns in the Authorizing Process



Extend Renewal Terms



THANK YOU

For further inquiries and
information

18 N Campus Blvd, Suite 100
Newtown Square, PA 19073

484-838-6880

info@groviderle.com



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LEARNING & EVALUATION

