



Charter Schools Institute
The State University of New York

Short-Term Planning Year Renewal Report

Oracle Charter School

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Charter Schools Institute
State University of New York
41 State Street, Suite 700
Albany, New York 12207
518/433-8277
518/427-6510 (fax)
www.newyorkcharters.org

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The final version of Institute renewal reports should be broadly shared by the school with the entire school community. This report will be posted on the Institute’s website at: www.newyorkcharters.org/pubsReportsRenewals.htm.

REPORT INTRODUCTION

This report is the primary vehicle by which the Charter Schools Institute (the “Institute”) transmits to the Board of Trustees of the State University of New York (the “State University Trustees”) its findings and recommendations regarding a school’s Application for Short-Term Planning Year Renewal. This report has been created and issued pursuant to the *Practices, Policies and Procedures for the Renewal of Charter Schools Authorized by the State University Board of Trustees* (the “State University Renewal Practices”).¹

Information about the State University’s renewal process, as well as an overview of the requirements for renewal under the New York Charter Schools Act of 1998 (as amended, the “Act”), are available in the [Appendix](#) of this report. Note too that the Institute’s website provides additional details and resources regarding renewal, including: the Institute’s comprehensive *Charter Renewal Handbook*, at: www.newyorkcharters.org/schoolsRenewOverview.htm.

RECOMMENDATION AND EXECUTIVE SUMMARY

Recommendation

Short-Term Planning Year Renewal of One Year

The Charter Schools Institute recommends that the State University Trustees approve the Application for Short-Term Planning Year Renewal of Oracle Charter School (“Oracle”) and renew the charter through and including July 31, 2010 with authority to provide instruction to students in 8th through 12th grades with a projected enrollment of 360 students, and consistent with the other terms set forth in its Application for Renewal.

Required Findings

Based on all the evidence submitted in the Application for Short-Term Planning Year Renewal, the Institute makes the following findings required by the Act. Oracle, as described in its renewal application, meets the requirements of the Act and all other applicable laws, rules and regulations. The school has demonstrated the ability to operate in an educationally and fiscally sound manner in the short-term charter period. In addition, given the programs it will offer, its structure and its purpose, approving the school to operate through and including July 31, 2010 is likely to improve student learning and achievement and materially further the purposes set out in Education Law subdivision 2850(2). Finally, granting a one year short-term planning year renewal will provide the Institute with another year of academic data, which will be analyzed as part of the Institute’s full renewal review. The extra year of data would enable the school to present the same amount of student outcome information as other high school programs facing initial renewal.

¹ The *Practices, Policies and Procedures for the Renewal of Charter Schools Authorized by the State University Board of Trustees* (last revised June 9, 2008) are available at <http://www.newyorkcharters.org/schoolsRenewOverview.htm>.

Consideration of School District Comments

In accordance with the Act, the Institute notified the school district in which the charter school is located, as well as public and non-public schools in the same geographic area, regarding the school's application for short-term planning year renewal. Through the date of this report, no comments were received in response.

Summary Discussion

Academic Success

Now in its fourth year of operation, Oracle Charter School currently serves over 300 students in the 7th through 12th grades, with 80 percent of the student body in high school. Based on the performance of its middle school students, Oracle Charter School is not close to meeting its English language arts goal, but is close to meeting its mathematics goal. As the school has yet to graduate a cohort of high school students, high school performance information has not yet become available; however, the school has reported encouraging preliminary results. At the close of the 2008-09 school year, when the school's accountability cohort has been identified for the first time and the 2005 cohort has completed its fourth year in high school, a comprehensive evaluation of the school's performance, based on its Accountability Plan will be possible.

Thus far in the charter period, Oracle's 7th and 8th grade students have not achieved their middle school Accountability Plan targets with 33.3 percent of the students at proficiency on the 2007-08 English language arts state assessment, an increase from 20.9 percent at proficiency the prior year. In mathematics, 59.8 percent of middle school students scored at proficiency on the 2007-08 state assessment, an increase from 19.8% the previous year. However, in its 2007-08 Accountability Plan Progress Report, the school reported promising preliminary results on the high school English language arts measures. With 77 percent of the 2005 cohort having passed the Regents English examination by their third year in the cohort, Oracle reported having achieved its absolute target which requires that 75 percent of students pass the examination by the end of their fourth year in the cohort. While comparison data for the local city school district's 2005 cohort are yet unavailable, Oracle reported outperforming the Buffalo City School District on the 2007 administration of the Regents English examination and scoring just below the Buffalo Academy of Visual and Performing Arts (BAVPA), a neighborhood school included in its Accountability Plan.

At the middle school level, Oracle improved its performance on the state mathematics assessment in the 2007-08 school year and, based on its middle school Accountability Plan measures, is currently close to meeting the mathematics goal. Additionally, the school has exceeded the state's Annual Measurable Objective (AMO) in each of the three previous years and in the most recent year outperformed its local school district by a wide margin on both the 7th and 8th grade tests. With respect to the school's high school performance, as of 2007-08, Oracle reported that 83 percent of students in the 2005 cohort had achieved proficiency on a Regents mathematics examination by their third year in the cohort, exceeding the 75 percent absolute target. While direct cohort comparison data are not yet available, Oracle reported far-outperforming the Buffalo City School District's 45 percent pass rate on the 2007 administration of the Regents Mathematics A examination and exceeding BAVPA's performance level in that year as well.

The school is deemed to be in Good Standing under the state's No Child Left Behind (NCLB) accountability system.

At the time of Oracle's third year (2007-08) inspection visit, the school had recognized that dramatic change was necessary to improve its academic program, instructional leadership, student performance and school culture. In the months preceding the inspection visit, the school had made many significant changes which were at varying stages of implementation. Some examples of those changes included a new school improvement team, discipline system, and lesson plan format, as well as revised job descriptions, and reassigned responsibilities for certain staff. However, at the time of the visit, the changes were either newly instituted or had yet to provide results.

According to its application for a Short-Term Planning Year Renewal (STPYR), Oracle has established an improved leadership model that includes a leadership team composed of the head of school, dean of students, curriculum coordinator, school counselor, technology director and the administrative manager. The application indicates that the roles and responsibilities of its leadership have been clearly articulated for instructional staff and that continual refinement of the instructional leadership model is an ongoing school improvement initiative.

In acknowledgement of certain curricular deficiencies, the application for STPYR indicates that Oracle's teachers and leaders have invested time and resources to create aligned curriculum maps for all grade levels and subject areas. Initially, the goal was to create a set of aligned curriculum maps that would allow teachers to articulate a scope and sequence for the school's curriculum. The focus has shifted to driving the school's teachers back to the use of state performance indicators in planning instruction. In the 2008-09 school year, teachers use the curriculum maps to connect unit and lesson planning with state performance standards to help students master the necessary knowledge and skills.

In the current school year, Oracle reports that it continues to provide professional development for staff related to instructional improvement. The professional development builds upon the frame put in place in the previous school year. For example, to address disciplinary challenges that negatively affected the provision of instruction, Oracle put in place a refined behavior management structure in the second semester of the 2007-08 school year. At the beginning of the 2008-09 school year, the school scheduled professional development to establish behavioral expectations for students and classroom procedures. In addition, professional development during the current school year also focuses on developing clear expectations and planning support for broader implementation of the instructional strategies found in the school's charter, including arts integration, technology integration, discussion-based learning, and project-based and cooperative learning.

According to the application for STPYR, Oracle Charter School has taken steps to systematize its support system for at-risk students. The school's Child Study Team (CST) meets regularly and has access to, and uses, relevant student data along with input from teachers and school leaders in order to identify students at-risk and determine which interventions are most appropriate to address their needs. The CST is chaired by one of the school's English teachers and convened prior to the start of the school year, mid-quarter and at the end of each quarter. Interventions range from core subject-area labs to research-based embedded instructional strategies.

At the time of submitting its application for STPYR, the results of the school's changes were yet unknown. The school will celebrate its first graduating class at the end of the 2008-09 school year. A complete evaluation of the effectiveness of these school changes will occur in relation to its application for renewal (due in the fall of this year).

Organizational Effectiveness and Viability

Oracle's application for STPYR acknowledges that the school has had a troubled organizational history. The application goes on to state that these difficulties were a direct result of an earlier failed leadership model. According to the application, the school and its board with the assistance and support of an educational consultant have worked to address the areas of deficiency and have taken steps to revise the organizational structure by establishing clear lines of communication and authority.

The current organizational model includes a Head of School, who is responsible for the daily operation of the school and reports directly to the school's board of trustees. The model also includes a School Improvement Team that brings together major stakeholders to address issues that could impede the school's academic performance. The team meets each month and makes recommendations to the Head of School. The school's trustees also play a role on the School Improvement Team.

In an effort to stabilize the school's staff and provide program consistency, all instructional and leadership contracts were renewed at the conclusion of the 2007-08 school year. The application for STPYR states that the school's staff now "demonstrates the commitment to, and pride in, developing successful students and a successful school."

The school's board consists of eight voting members, more than half of whom have been on the board for three or more years. The board is organized in a committee structure and includes a committee that focuses on the school's academic program. The academics committee meets with the Head of School to review evidence of teacher and student performance and provide support and input. The board has allocated funds for board development, which will focus this school year on developing a set of routine metrics, policies and procedures to support a strong school and to effectively monitor its performance. The Institute notes that this is something high-performing charter schools tend to focus on earlier in their charter terms.

Fiscal Soundness

The school is in stable financial condition and has been stable throughout its existence. The school operates pursuant to a long-range fiscal plan and has produced realistic budgets over the term of the charter. The school's record of financial reporting has been good. Each required financial report has been submitted on-time and has been complete and accurate. The school has not been cited for any material financial or internal control weaknesses as part of its annual audits.

Oracle leases its facility from Oracle Building Corporation, a subsidiary of the charter school that holds the title to the property. Therefore, the school's facility expense should remain stable.

Plans for the Next Charter Period

In its Application for Short-Term Planning Year Renewal, Oracle Charter School states that it will eliminate the 7th grade in the STPYR period by not accepting any new 7th grade students. The school would eliminate 8th grade during the following charter period, if awarded. The school seeks to change its grade configuration to correct what it describes as a fundamental flaw in its original program design. The city school district is based upon a kindergarten through 8th grade model (K – 4th and 5th – 8th). Therefore, students and their families typically exercise school choice options

either at the end of the primary grades or at the end of middle school. The school now believes that beginning with 7th grade is not in the best interest of the school's long-term viability. In addition, the Application cites research that indicates that in situations where middle and high school programs are housed together in a 7th through 12th grade pattern, the middle level program concerns tend to be subordinated to the high school needs. In contrast, in the "Rationale for Grades Served" in Oracle's original application, the applicants had cited abysmal 8th grade testing data in Buffalo in 2003 (25 percent at state standards in mathematics and 22% in English language arts), and had stated the following in support of serving 7th and 8th grades in addition to high school grades:

We have chosen to include the 7th and 8th grade levels because our school culture and curriculum will be centered on building a strong community, developing independent learners, encouraging critical thinking, and fostering self-knowledge. Therefore, we feel it is necessary to scaffold students through the middle years so that they are fully prepared for the expectations of our high school program. (Footnote referencing the Executive Summary omitted).

It is not entirely clear what extra supports the school would be providing to incoming freshman, but those supports will not have to be delivered during the short-term renewal period. Also, as a justification for opening the school, the Executive Summary contained within Oracle's original application cited the fact that few charter schools were serving middle school grades in Buffalo. As the elimination of the 7th grade would neither diminish the data set generated by the school (because there would be no more 7th grade scores available at renewal given the testing schedules) nor cause the school to be educationally or fiscally unsound (see below), and the State University Trustees have never favored "forcing" a school to offer education in grades it does not wish to serve, the Institute does not object to the grade change. Moreover, the Institute feels that the change may help stabilize the remaining grades in the school. However, the Institute notes that the change represents a revision to the school design and mission that may factor into the renewal decision; and the Institute will still use the 7th grade scores in any renewal analysis. Oracle would therefore enroll 8th – 12th grade students during the term of the one-year STPYR.

Also during the one year period, Oracle plans to: phase out Latin as its foreign language and instead offer Spanish; move away from the intent to pursue the International Baccalaureate accreditation during this charter term; eliminate the requirement that students obtain a fourth credit in either mathematics or science; and implement a school uniform policy. These changes result from what the school has learned during its current charter term in relation to the needs of its students and would allow the school greater flexibility in addressing those needs. In addition, other changes from its original charter include the school not implementing single-sex learning environments (one core class at each grade level scheduled as a single-sex instructional and learning opportunity), Challenge Weeks (two weeks prior to school opening and two weeks after school closes for enhancement/remediation) or a community technology center (originally Buffalo Oracle, Inc., a separate 501(c)(3), intended to apply for funding to establish the technology center through the U.S. Department of Education and students would have been eligible to use its computers) within the next charter term.

During the STPYR, Oracle would remain in the same leased facility. The budget is based on an enrollment of 360 students with a projected chartered enrollment of 392. The school currently has an enrollment of 325 students with a chartered enrollment of 360. Based on the original charter application, the chartered enrollment next year would have been approximately

420 students. Since the school will be losing a grade in the renewal year, reaching the projected enrollment may be a challenge relying heavily on incoming 9th graders. The school has presented a reasonable and appropriate fiscal plan that is achievable if the projected enrollment is reached. The budget projects a small operating surplus and cash flow surplus for the renewal year.

Although it is not addressed in the renewal application, the school has begun to perform all of its own financial activities that were previously contracted to a local accounting firm. It should be noted that bringing the “back office” activities in-house is a major undertaking for a school that has previously outsourced such work.

In sum, the school has not demonstrated that it is yet meeting or coming close to meeting the State University Trustees’ criteria for a full-term, five year renewal. The school is making academic, governance and school design changes that it hopes will help it earn a short-term renewal next year. While the Institute cannot predict the outcome of these changes, the short-term planning year renewal, if approved, will provide the State University Trustees with a more complete data set to be analyzed as part of the school’s full renewal review in the 2010-11 school year.

SCHOOL DESCRIPTION

Oracle Charter School (“Oracle”) was approved by the Board of Trustees of the State University of New York on January 27, 2004 and by the Board of Regents on March 23rd of the same year. After taking a planning year, the school began instruction in August of 2005 at 888 Delaware Avenue, Buffalo, New York, serving 184 students in grades 7 - 9. The school served 325 students in grades 7 - 12 in the 2008-09 school year.

As of the date of the current school inspection, the Oracle board of trustees consisted of the following individuals:

- David Steffan, Chair;
- Adrian Roselli, Vice Chair;
- Janell Andersen, Treasurer;
- Michelle Scott, Secretary;
- George Kimble, PTA Trustee;
- Sandra Olsen;
- Jim Cammarata, Faculty Trustee;
- Donette Ruffin;
- Lucy Tretiak-Caruso; and
- Edward Leak.

The school’s mission statement is as follows:

The Oracle Charter School will engage students of varying abilities in a concept-rich, challenging academic experience, enabling them to inhabit a meaningful place within their academic and civic communities, and to know and value themselves as individuals. To that end, Oracle Charter School will graduate students who are able to meet or exceed state performance standards, and who are prepared thereby to take the next step in their lives.

According to the Executive Summary of its charter, the founders envisioned Oracle Charter School as being “more effective at preparing a broad range of middle and high school students for the challenges of college and their future roles in the workplace and community than other public middle and high schools in the Buffalo district.” The charter states that Oracle will achieve its mission through the implementation of the following key design elements:

- A curriculum infused with arts and technology that emphasizes interdisciplinary study and cooperative learning, wherein students have the opportunity to act both as learners and as mentors;
- An academic community that empowers students to become life-long learners, encourages them to take responsibility for their own intellectual, career, and civic growth, and offers faculty, students, and parents a trusting, supportive, and mutually respectful environment; and

- Students with access to and an understanding of the academic, social, and technological infrastructures that shape their lives and communities as well as an understanding of the ways in which they, as individuals, impact and are influenced by their environments.

If the school’s application for short-term planning year renewal is approved, Oracle has proposed making academic, governance and school design changes that it hopes will help it earn a short-term renewal next year. These changes include not offering instruction in the 7th grade in 2009-10, and phasing out the 8th grade the following year.

Also during the one year period, Oracle proposes to: phase out Latin as its foreign language and instead offer Spanish; move away from the intent to pursue the International Baccalaureate accreditation during this charter term; eliminate the requirement that students obtain a fourth credit in either mathematics or science; and implement a school uniform policy. These changes result from what the school has learned during its current charter term in relation to the needs of its students and will allow the school greater flexibility in addressing those needs.

School Year

190 days (Buffalo City School District: 185 days)

School Day

7:45 a.m. to 3:15 p.m.²

Enrollment

	Original Chartered Enrollment	Revised Chartered Enrollment	Actual Enrollment³	Original Chartered Grades	Revised Grades Served	Actual Grades Served	Complying
2004-05	Planning Year	Planning Year	Planning Year	Planning Year	Planning Year	Planning Year	Planning Year
2005-06	180		184	7-9		7-9	YES
2006-07	240		243	7-10		7-10	YES
2007-08	300		273	7-11		7-11	YES
2008-09	360		325	7-12		7-12	YES
2009-10	360			8-12		8-12	

² 3:20 p.m. to 4:00 p.m. is available for office hours and remediation according to the school’s original Charter Application.

³ Actual enrollment per the Institute’s Official Enrollment Table. Note that the NYSED 2005-06 database, upon which the Free and Reduced lunch figures are calculated, cited an enrollment of 180 students for 2005-06.

Race/Ethnicity	2005-06		2006-07	
	<u>% of Enroll. Oracle CS</u>	<u>% of Enroll. Buffalo CSD</u>	<u>% of Enroll. Oracle CS</u>	<u>% of Enroll. Buffalo CSD</u>
American Indian or Alaskan Native	1%	1%	0%	2%
Black (Not Hispanic)	54%	57%	68%	57%
Hispanic	7%	14%	8%	14%
White	38%	1%	24%	1%
Asian or Native Hawaiian/Other Pacific Islander	0%	26%	0%	25%
Multi-racial	NA	0%	0%	0%

Source: 2006-07 NYSED Report Cards

Free/Reduced Lunch	2005-06		2006-07	
	<u>% of Enroll. Oracle CS</u>	<u>% of Enroll. Buffalo CSD</u>	<u>% of Enroll. Oracle CS</u>	<u>% of Enroll. Buffalo CSD</u>
Eligible for Free Lunch	42%	67%	51%	70%
Eligible for Reduced Lunch	17%	10%	11%	8%

Source: 2006-07 NYSED Report Cards

School Charter History

Charter Year	School Year	Year of Operation	Evaluation Visit	Feedback to School	Other Actions Taken
Original Charter – 1st Year	2004-05	Planning Year	NO		NONE
Original Charter – 2 nd Year	2005-06	1 st	YES	Prior Action Letter, End-of-Year Evaluation Letter	
Original Charter – 3 rd Year	2006-07	2 nd	YES	End-of-Year Evaluation Report	
Original Charter – 4 th Year	2007-08	3 rd	YES	End-of-Year Evaluation Report	
Original Charter – 5 th Year	2008-08	4 th	Abbreviated	STPYRenewal Report	

APPENDIX

An Overview of Renewal Requirements

The New York State Charter Schools Act of 1998 (as amended) (the “Act”) authorizes the Board of Trustees of the State University of New York to grant charters for the purpose of organizing and operating independent and autonomous public charter schools. Charter schools provide opportunities for teachers, parents, and community members to establish and maintain schools that operate independent of existing schools and school districts in order to accomplish the following objectives:

- improve student learning and achievement;
- increase learning opportunities for all students, with special emphasis on expanded learning experiences for students who are at-risk of academic failure;
- provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system;
- create new professional opportunities for teachers, school administrators and other school personnel;
- encourage the use of different and innovative teaching methods; and
- provide schools with a method to change from rule-based to performance based accountability systems by holding the schools accountable for meeting measurable student achievement results.⁴

In order to assist them in carrying out their responsibilities under the Act, the State University Trustees authorized the establishment of the Charter Schools Institute of the State University of New York. Among its duties, the Institute is charged with evaluating charter schools’ applications for renewal and providing its resulting findings and recommendations to the State University Trustees.

This report is the primary vehicle by which the Institute transmits to the State University Trustees its findings and recommendations regarding a school’s renewal application, and more broadly, details the merits of a school’s case for renewal. This report has been created and issued pursuant to the *Practices, Policies and Procedures for the Renewal of Charter Schools Authorized by the State University Board of Trustees* (the “State University Renewal Practices”).⁵

Statutory and Regulatory Considerations

Charters may be renewed, upon application, for a term of up to five years. There is no limitation upon the number of times that a charter may be renewed. The Act prescribes the following requirements for a charter school renewal application:

- a report of the progress of the charter school in achieving the educational objectives set forth in its charter;

⁴ See § 2850 of the New York Education Law.

⁵ The *Practices, Policies and Procedures for the Renewal of Charter Schools Authorized by the State University Board of Trustees* (last revised June 9, 2008) are available at www.newyorkcharters.org.

- a detailed financial statement that discloses the cost of administration, instruction and other spending categories for the charter school that will allow a comparison of such costs to other schools, both public and private;
- copies of each of the annual reports of the charter school including the charter school report cards and certified financial statements; and
- indications of parent and student satisfaction.⁶

The Institute’s processes and procedures mirror these requirements and meet the objectives of the Act.⁷

As a charter authorizing entity, the State University Trustees can renew a charter so long as the Trustees can make each of the following findings (“Required Findings”):

- the charter school described in the application meets the requirements of the Act and all other applicable laws, rules and regulations;
- the applicant can demonstrate the ability to operate the school in an educationally and fiscally sound manner;
- granting the application is likely to improve student learning and achievement and materially further the purposes of the Act; and,
- (if applicable) in a school district where the total enrollment of resident students attending charter schools in the base year is greater than five percent of the total public school enrollment of the school district in the base year: (i) granting the application would have a significant educational benefit to the students expected to attend the proposed charter school; or (ii) the school district in which the charter school will be located consents to such application.⁸

Where the State University Trustees approve a renewal application, they are required under the Act to submit the application and a proposed charter to the Board of Regents for its review.⁹ The Regents may approve the proposed charter or return the proposed charter to the State University Trustees with the Regents’ comments and recommendation(s). In the former case, the charter will then issue and become operational on the day the current charter expires. In the latter case (return to the State University Trustees), the State University Trustees must review the returned proposed charter in light of the Regents’ comments and respond by resubmitting the charter (with or without modification) to the Regents, or by abandoning the proposed charter. Should the State University Trustees resubmit the charter, the Regents have thirty days to act to approve it. If they do not approve the proposed charter, it will be deemed approved and will issue by operation of law; as above, it will become operational upon expiration of the current charter.¹⁰

⁶ Education Law § 2851(4).

⁷ Further explication of these policies and procedures is available on the Charter Schools Institute’s website. See www.newyorkcharters.org/schoolsRenewOverview.htm.

⁸ See Education Law § 2852(2).

⁹ See Education Law § 2852(5).

¹⁰ See Education Law §§ 2852(5-a) and (5-b).

Process for Short-Term Planning Year Renewals

This report contains the findings and recommendations of the Institute regarding a school's application for charter renewal, specifically, a short-term planning year renewal.

Because the charter period begins upon final approval of the proposed charter (as opposed to upon the commencement of the school's operation), charter schools that have taken one or more planning years come to renewal with, at most, three years of data regarding school and student performance. The limited time of operation (and the concomitant reduced amount of student assessment outcomes) makes it extremely difficult for the Institute to determine any trends in student performance as well as make a well-reasoned determination as to whether the school should be renewed for a full-term of five years. To address this issue, the State University Trustees approved the use of the short-term planning year renewal option. This option is available to schools that have taken one or more planning years. These schools are able, with limited though legally and programmatically sufficient review, to obtain renewal for a period equal to the number of planning years taken. In turn, therefore, a school will not be required to seek renewal for a full-term of five years until it has been in operation for at least four full years.

The Institute's protocol for short-term planning year renewal is based on the same fundamental questions all schools must address in applying for renewal of their charters:

1. Is the school an academic success?
2. Is the school an effective, viable organization?
3. Is the school fiscally sound?
4. What are the school's plans for the term of the next charter and are they reasonable, feasible and achievable?

The Institute also makes the same legal findings as it does for any Application for Renewal submitted to it. However, in the case of a short-term planning year renewal, where the renewal period is for a limited period, the Institute employs a somewhat abbreviated process to determine its recommendation and make the necessary findings.

In addition to the application itself, the Institute reviews the following sources of evidence in making a determination on an application for short-term planning year renewal.

1. **Academic Success:** the Institute will review the school's most recent Accountability Plan Progress Report (due each year that the school has been in operation on August 1st), and, as needed and available, any prior Accountability Plan Progress Reports that the school has filed. Where school's file for short-term planning year renewal early in the initial renewal period, the information that is available is likely to be limited.
2. **Effective, Viable Organization:** the Institute will conduct a desk audit of the school's visit and inspection reports, if any have been promulgated. This will include visits conducted by the Institute or other entities, such as the State Education Department (SED) or other external reviewers. In addition, the Institute will review records regarding the school's compliance with existing laws, regulations and policies to determine whether the school has been in

substantial compliance. The Institute will review other information as it deems necessary, including copies of board minutes.

3. Fiscal Soundness: the Institute will refer to the most current desk audit of the school and will review other related materials and documents as it deems necessary.
4. Future Plans: the Institute will look primarily at the school's plans as set forth in the Application for Renewal. The Institute will take cognizance of other data in its possession to determine the reasonableness of the school's proposed plans, especially where the school proposes a new program, a different management structure, additional grades or other significant changes.

Finally, the Institute reserves the right to make a renewal inspection visit where necessary, although doing so would be the exception and not the rule with regard to short-term planning year Applications for Renewal.

The Institute then prepares a renewal report, which is reviewed by key staff members. The report is then transmitted to the Charter Schools Committee of the State University Board of Trustees, the other members of the State University Trustees, and the school itself. This report is the product of that process.