



## **Charter School Annual Report Guidelines**

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**2008-09 School Year**

**Massachusetts Department of Elementary and Secondary Education**  
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# Charter School Annual Report Guidelines 2008-09

## Introduction

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By August 1 of each year, each charter school must submit an annual report to the Department of Elementary and Secondary Education (Department) and the public, as set forth in the charter school statute. This report provides a comprehensive picture of the recently completed academic year as it relates to the school's accountability plan objectives and evidence regarding the three areas guiding charter school accountability:

- the success of the academic program,
- the viability of the organization, and
- the faithfulness of the school to the terms of its charter.

The annual report will be used by the Department to review the school's performance and progress for the past academic year, and will serve as one of the primary pieces of evidence that the Board of Elementary and Secondary Education will review when it considers a school's application for charter renewal.

The annual report is a critical document in charter school accountability; it is intended to be a clear, concise report regarding school performance and its progress toward meeting accountability plan objectives and Common School Performance Criteria. Required elements that must be included in each report are set forth in this document. Please note that reports that do not fully and clearly document the required information may be returned for revision.

## General Instructions

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The annual report must be a clear and accessible document for parents, the Department, and the general public. **The total length of the annual report should not exceed 25-30 pages (excluding attachments).** Please follow the checklist on page 3 of these guidelines to help ensure that all required elements are included.

**The annual report must be received in the Charter School Office on or before Friday, July 31, 2009.** No waivers or extended deadline requests are granted.

An accessible, **electronic version** of the annual report must be submitted through a **web drop function on the Department's security portal**. Electronic versions of each school's annual report will be posted to the Department's website.

By statute, a copy of the annual report must be submitted to the Department and the local school committee chair(s) of the district(s) from which the school draws students. A school's annual report, according to state statute, must be made available to families of current students as well as families contemplating enrollment. While the full report does not need to be sent to each family, the school should inform families of enrolled and prospective students that an annual report is available upon request. The school may make the annual report available to members of the wider community by displaying it in the local library, the school's front office, and on the school's website.

### **Mandatory Accessibility Requirements:**

The Commonwealth of Massachusetts is committed to providing information to the public that is accessible to all, including those utilizing assistive technology to access information. This means that you must prepare an accessible electronic version of your school's annual report for submission to the Charter School Office (CSO). The electronic version must be consistent with the [ESE Website Accessibility Policy](#) and [Web Content Standards Checklist](#). The document will meet the requirements by:

- keeping the file size less than 5MB,
- adding alternative text (alt-text) for all images, including pictures, electronic signatures, scanned documents, tables, graphs, and other data,
- adding an electronic title, subject, and author under File > Properties, and
- removing track changes and comments.

### **Directions for Annual Report web-drop:**

- Go to the Massachusetts Department of Elementary and Secondary Education home page: [www.doe.mass.edu](http://www.doe.mass.edu) ,
- Go to the **Select Program** drop down menu and select **Security Portal** ,
- Sign in,
- Click on **Drop Box Central**,
- Click on **Charter School File Exchange** and push next,
- Click on **Browse** and locate your school's annual report on your school's computer, hard drive, or server,
- Select the file to upload,
- Click the **Upload File Button**.

If you have problems accessing any of these fields you may not have adequate security clearance and need to contact your school's directory administrator. If you have questions about the submission of annual reports, please contact the Charter School Office, 781-338-3227.

## Checklist of Components

- 1. School address/contact information
- 2. Table of contents and page numbers
- 3. Introductory description of the school
- 4. Letter from chair of the board of trustees
- 5. School mission statement
- 6. Performance and plans section
  - Faithfulness to charter
    - Accountability plan objectives and measures relating to faithfulness to charter
    - Common school performance criteria – faithfulness to charter
  - Academic program success
    - Accountability plan objectives and measures relating to academic program success
    - Common school performance criteria – academic program success
  - Organizational viability
    - Accountability plan objectives and measures relating to organizational viability
    - Common school performance criteria – organizational viability
- 7. Dissemination
- 8. Financial reports
  - Fiscal Year 2009 Statement of Revenues, Expenses and Changes in Net Assets (Income Statement)
  - Fiscal Year 2009 Statement of Net Assets (Balance Sheet)
  - Fiscal Year 2010 approved school budget
- 9. Data section (please include in tables as indicated in *Content Requirements*, below)
  - Instructional time
  - Student enrollment information
  - Student demographic and subgroup information
  - Administrative roster and organizational chart
  - Teacher and staff attrition
  - Members of the board of trustees
  - MCAS results
- 10. Attachments (optional)

## **Content Requirements**

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The following elements must appear in the school's annual report for a maximum of 25-30 pages:

### **1. School address/contact information**

Include this information in a prominent place, including email/website and fax information.

### **2. Table of contents and page numbers**

Pages must be numbered and a table of contents provided.

### **3. Introductory description of the school**

This opening paragraph provides the reader with an overview of the school location and population. If the school is regional, list the regions from which students are drawn. Include the maximum number of students the school can enroll (enrollment cap) and the current grade span. Schools that have not yet reached full capacity should also include describe the anticipated growth plan, including the grades and number of students to be added.

### **4. Letter from chair of the board of trustees**

This letter is to inform the public, as well as future site visitors, of any significant changes that have taken place over the past year. This could include the departure or arrival of certain key staff/trustees, a change in the organizational model, changes in curriculum, or modification of programmatic elements.

### **5. School mission statement**

The mission statement as stated in the school's charter or as amended and approved by the Department.

### **6. Performance and plans section**

This section is the narrative core of the report. The purpose of this section is to provide information concerning the school's performance over the 2008-09 school year and plans for the future. This information is organized according to the three areas of charter school accountability – faithfulness to charter, academic program success, and organizational viability. In each section, the school provides information relative to both its accountability plan objectives and measures and the Common School Performance Criteria.

In the accountability plan sections, list each objective and measure contained in the school's current, CSO-approved<sup>1</sup> accountability plan. For each listed measure, state whether the school has met, is making progress toward meeting, or has not met the measure, and provide data or other evidence supporting the statement. Schools that did not make progress toward reaching their objectives should include an explanation of why this was the case and what the school is doing to attain these objectives in the coming year.

In the Common School Performance Criteria sections, schools are asked to provide evidence of performance over the 2008-09 school year in the areas derived from the Common School

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<sup>1</sup> If the school's accountability plan has not been approved, the school should use their draft plan and be clear that they are reporting on draft objectives and measures.

Performance Criteria that are listed below. For each area, please provide an analysis of the strengths, challenges, and opportunities that the school faces relative to that area. ***Do not duplicate information already provided in reporting on the school's accountability plan.***

○ **Faithfulness to Charter**

- Report on progress toward meeting accountability plan objectives and measures. All objectives and measures must be included.
- Common School Performance Criteria

**Implementation of Mission, Vision, and Educational Philosophy:** Describe and provide evidence of how the school is faithful to the mission, vision, and educational philosophy defined in the charter application and any subsequent approved amendment(s).

○ **Academic Program Success**

- Report on progress toward meeting accountability plan objectives and measures. All objectives and measures must be included.
- Common School Performance Criteria

**Curriculum:** Describe the school's curriculum, as documented and implemented during the 2008-09 school year, including a description of all curricular elements. Identify and briefly describe any major curriculum changes made by the school during the 2008-09 school year.

**Instruction:** Describe the school-wide instructional practice implemented during the 2008-09 school year, how it aligned with the school design and student learning objectives, how it was delivered, and how expectations were conveyed to teachers and students.

**Program evaluation:** Describe and provide evidence of the systems and structures that were in place during the 2008-09 school year to review the academic program for quality and effectiveness. Describe any modifications made to programs to ensure improvement. Describe how qualitative and quantitative evidence was used by teachers and school leaders to inform and guide instructional planning and practice.

**School culture:** Describe the policies and structures that were in place during the 2008-09 school year to create a school culture, support student learning, and further the implementation of the school's mission. This section of the report may include a discussion of any school-wide behavior management systems or structures, and may also include a summary describing the general reasons for disciplinary actions (in-school suspensions, out-of-school suspensions, and expulsions).

**Diverse learners:** Describe and provide evidence of how the school established and implemented accommodations that address the needs of diverse learners, including those with special education and English language learner needs.

**Supervision and evaluation of teachers:** Describe the process(es) by which school leaders provided teachers with feedback and guidance, including the process for formal evaluation of teachers, the standards that were used for evaluation purposes, and how the school made use of evaluation results.

**Professional development:** Describe the major professional development activities undertaken by the school during the 2008-09 school year, why those activities were chosen, any outcomes from the professional development activities, and how the effectiveness of these activities is evaluated.

○ **Organizational Viability**

- Report on progress towards meeting accountability plan objectives and measures. All objectives and measures must be included.
- Common School Performance Criteria

**Policy decisions:** Describe any major policy decisions made by the school's board of trustees during the 2008-09 school year, including a description of the systems and structures for decision-making and communication that have been established by the school.

**Amendments to the charter:** Describe any major or minor amendments to the charter proposed by the board of trustees and approved by the Commissioner or Board of Elementary and Secondary Education

**Complaints:** Describe any official complaints received by the board of trustees in writing pursuant to the state's charter school regulations, 603 CMR 1.10. This summary should describe each complaint in general terms, without mentioning specific names or information that may be deemed confidential, and should describe how each complaint has been resolved. Complaints received by telephone or in person are not considered official complaints.

**Oversight:** Describe how the board of trustees assessed the performance of the school and school leader(s) during the 2008-09 school year. Include information about which constituent groups in the school were involved in the evaluation process.

**Board planning:** Describe any relevant planning efforts undertaken by the board of trustees, the results of those efforts, and the current status of any initiatives launched as a result of this planning. Describe any relevant goals established by the board of trustees during the 2008-09 school year outside of the school's accountability plan. Describe the tools for measuring progress toward meeting those goals, and how progress is reported to the board of trustees.

**Family satisfaction:** Describe how the school measured whether families were satisfied with the school's program. Include the results of any student, staff, and/or family surveys conducted during the 2008-09 school year.

**Financial oversight:** Describe how the school developed a budget for fiscal year 2010. Include information on the budget planning process and the process for making decisions and setting priorities.

**7. Dissemination**

This description should, according to the statute, give “evidence that the charter school is developing or has provided models for replication and best practices in education.”

**8. Financial reports**

- Unaudited FY09 statement of revenues, expenses, and changes in net assets (income statement). This statement should set forth, by appropriate categories, the revenue and expenditures for the fiscal year 2009 (July 1, 2008 to June 30, 2009). Since most school’s independent audits will not have been completed by the August 1 deadline, please note that the report is an unaudited statement. *Note: An independent audit for the year ending June 30, 2009, must be filed with the Department of Elementary and Secondary Education and the State Auditor by January 1, 2010.*
- Fiscal year 2009 Statement of net assets (balance sheet). The balance sheet should set forth the charter school’s assets, liabilities, and fund balances or equities.
- Fiscal year 2010 approved school budget.

**9. Data section**

This section includes a number of required elements. Please copy and paste the tables below into the school’s annual report and use them to provide the information requested.

<b>INSTRUCTIONAL TIME:</b>	
Total number of instructional days for the 2008-09 school year:	
First and last day of the 2008-09 school year:	
Length of school day (please note if schedule varies throughout the week or the year):	

<b>STUDENT ENROLLMENT INFORMATION:</b>	
Number of students who completed the 2007-08 school year but did not reenroll for the 2008-09 school year (excluding graduates):	
Total number of students enrolled as of October 1, 2008:	
Total number of students who enrolled during the 2008-09 school year, after October 1, 2008:	
Total number of students who left during the 2008-09 school year, after October 1, 2008:	
Total number of students enrolled as of the June 2009 SIMS submission:	
Number of students who graduated at the end of the 2008-09 school year:	

**In addition to completing this table, please provide a summary of the reasons for student departures (excluding graduation).**

**STUDENT DEMOGRAPHIC AND SUBGROUP INFORMATION  
(for students enrolled as of the June 2009 SIMS submission)**

Race/Ethnicity	# of students	% of entire student body
African-American		
Asian		
Hispanic		
Native American		
White		
Native Hawaiian, Pacific Islander		
Multi-Race, Non-Hispanic		
Special Education		
Limited English Proficient		
Low Income		

**ADMINISTRATIVE ROSTER FOR THE 2008-09 SCHOOL YEAR**

Title	Brief Job Description	Start date	End date (if no longer employed at the school)

Add additional rows as necessary. **In addition to completing this table, please provide an organizational chart including administrators' names and titles.**

**TEACHERS AND STAFF ATTRITION FOR THE 2008-09 SCHOOL YEAR**

	Number as of the last day of the 2008-09 school year	Departures during the 2008-09 school year	Departures at the end of the school year
Teachers			
Other Staff			

**In addition to completing this table, please provide a summary of the reasons for teacher and staff departures.**

<b>BOARD MEMBERS FOR THE 2008-09 SCHOOL YEAR</b>				
Name	Position on the Board	Committee affiliation(s)	Area of expertise, and/or additional role at school (parent, staff member etc.)	- Number of terms served; - Length of each term, including date of election and expiration

Add additional rows as necessary.

**10. Attachments (optional)**

Any attachments should be explicitly referred to in the text of the report and must be directly relevant to that part of the text. Attachments should not exceed five pages in total.

## Applicable Laws and Regulations

### MGL Chapter 71 § 89 (gg)

(gg) Each charter school shall submit to the Board of Elementary and Secondary Education, to the local school committee, to each parent or guardian of its enrolled students, and to each parent or guardian contemplating enrollment in that charter school an annual report. The annual report shall be issued no later than August 1 of each year for the preceding school year. The annual report shall be in such form as may be prescribed by the board and shall include at least the following components: (1) discussion of progress made toward the achievement of the goals set forth in the charter; and (2) a financial statement setting forth by appropriate categories, the revenue and expenditures for the year just ended.

### 603 CMR 1.09 Ongoing Review of Charter Schools

(1) **Annual Report.** A charter school shall submit to the Board of Elementary and Secondary Education and the local school committee and make available to every parent or guardian of its enrolled students and to every parent or guardian who expresses interest in enrolling in that charter school, an annual report. The annual report shall be issued no later than August 1 of each year for the preceding school year. The annual report shall include the following information:

- (a) a financial statement setting forth by appropriate categories the revenue and expenditures for the year just ended, and a balance sheet setting forth the charter school's assets, liabilities, and fund balances or equities;
- (b) projections of income and expenses for the upcoming school year;
- (c) discussion of progress made toward achievement of the goals of the charter and accountability plan;
- (d) evidence that the charter school is developing or has provided models for replication and best practices in education; and
- (e) such other information as the Board of Elementary and Secondary Education may require in guidelines.