

Notes on Organizational Framework

I. Introduction and Background

The excel document, "Organizational Performance Framework DRAFT Revisions" contains 5 tabs.

- Tab 1: Current Organizational Performance Framework
- Tab 2: Organizational Performance Framework: Draft #1
- Tab 3: Compliance Checklist-Draft #1
- Tab 4: Organizational Performance Framework: Draft #2
- Tab 5: Compliance Checklist-Draft #2

The SPCSA's current organizational framework contains five indicators, worth 20 points each indicator. These indicators are mapped to NACSA standards. Schools earn a "Meets Standard" or "Does Not Meet Standard" on each indicator. Across 19 measures, varying in points worth 3.33 to 10 points each, schools must earn a total of 80 points to earn a "Meets Standard" rating.

- Indicator 1: Education Program
- Indicator 2: Financial Management and Oversight
- Indicator 3: Governance and Reporting
- Indicator 4: Students and Employees
- Indicator 5: School Environment

II. Recommended changes

To determine recommended changes, we:

- Reviewed Nevada statute and code to determine what was required by law to stay intact on the Organizational Performance framework.
- Reviewed and summarized the feedback on the Organizational Performance Framework, cross walked the SPCSA's Organizational framework with NACSA's most recent guidance on performance framework development and use.
- Reviewed other authorizers frameworks and best practices. And when possible, also discussed these frameworks with the authorizers themselves.

The majority of stakeholder feedback about the Organizational framework centered on three overarching themes:

- (1) The Organizational Indicators and weight of the measures are not prioritized based on importance.
- (2) The Organization framework has many measures but does not provide information meaningful to determine the effectiveness of the school's organizational capacity.

(3) Schools found the Organizational framework to be difficult to determine where they were doing well and where there were areas of improvement.

Our work to determine the recommendations also incorporates NACSA and other authorizer's practices, as described below. We suggest the following changes:

(1) We recommend moving the financial indicator from the original Organizational framework to the Financial framework. As indicated in the Financial framework notes document, this recommendation is in alignment with NACSA's latest guidance on drafting performance frameworks.

(2) Because the Organizational framework contains compliance indicators, we suggest moving the compliance indicators to a checklist, as other authorizers have found to be useful. Moving to a checklist allows each standard to be assessed individually - helping schools and the boards certifying their compliance - to look across these standards and see where they are and are not in compliance. A separate indicator to provide a school's rating specifically on this compliance checklist has been added to the draft Organizational framework.

(3) Lastly, in line with NACSA's latest guidance, we recommend moving the examination of the Organizational framework from compliance only, to compliance plus quality indicators in at least two areas: Board governance and the educational program to determine whether the school is setting up conditions for students to be successful. These quality indicators will allow for discussions around continuous improvement.

III. Notes on the recommendations and documents:

Overarching Question(s) the Organizational framework answers:

1. Is the organization effectively run? / Is the school organizationally sound?
2. Does the school meet the expectations for governing body performance, including compliance with all applicable laws, rules, and terms of the charter contract?
3. Is the school providing the appropriate conditions for student and staff success?

Draft #1 retains the remaining compliance measures not easily certifiable by the Board, and retains five indicators:

- Indicator 1: Education Program
- Indicator 2: Governance Roles and Responsibilities
- Indicator 3: Student Accessibility and Support
- Indicator 4: Staff and Community
- Indicator 5: Compliance with Legal requirements

The Compliance checklist with Draft #1, therefore contains most measures required by law, code or regulation.

Quality measures added to draft 1, include:

- Indicator 1b. Educational Program, Does the school deliver a high-quality academic program that meets the needs of all students? This measure assesses evidence gathered during the site visits.
- Indicator 2b. Governance Responsibilities: Does the board fulfill its governance and fiduciary duties according to the SPCSA Governance Standards? This measure assesses evidence to determine a board's capacity to meet the SPCSA's Governance standards.
- Indicator 4a. Staff: Does the school create a work environment that fosters the professional growth and retention of effective employees. This measure assesses evidence from site visits and staff reports and staff retention data, as recommended by NACSA.
- Indicator 4b. School Community: Does the school achieve a cohesive community that supports student achievement, family satisfaction, and the organizational health of the school? This measure assesses evidence from site visits and governing board meetings, as recommended by NACSA.

Draft #2 moves all compliance measures to the Compliance checklist and adds quality indicators, for a total of three indicators.

- Indicator 1: Education Program
- Indicator 2: Governance Membership and Responsibilities
- Indicator 3: Compliance with Legal Requirements

Scale to use:

Compliance indicator:

Was 2-points on each:

- Meets Standard
- Does Not Meet Standard

Move to:

- Meets Standard if all requirements on the checklist are rated In Compliance or In Compliance by Assurances
- Working to Meet Standard if one or more requirements are rated Partially Compliant but no requirements are rated Out of Compliance
- Does Not Meet Standard if one or more requirements are rated Out of Compliance

For quality:

3-Points:

- Meets Standard
- Working to Meet (or Approaches Standard)
- Does not Meet Standard

IV. Additional information about incorporating quality indicators

We incorporated quality indicators as a mechanism to encourage continuous improvement. According to NACSA, "in many cases [the] quality measures can be leading indicators for student and financial outcomes."

Implications to including quality indicators:

- Not always quantifiable
- Can be difficult to articulate a "score" leading to differing designations depending on reviewer (a rubric can help.)
- Materiality: Meeting the standard does not require perfection. An authorizer must use professional judgment to determine if a school has substantially met the standard as presented.

V. Considerations to think through during this round

- Where to include quality indicators?
 - Have compliance and quantity metrics across all categories: educational program, governance, Student, staff, legal
 - Some categories? (all the current Organizational framework can be moved to a compliance check) Board?
- Gather all "quality" into one category, such as "Conditions for success"
- How to use quality indicators:
 - For all schools, every year?
 - Tier quality checks:
 - Some schools can "earn the way out" of quality checks (e.g. schools that have shown quality, get a quality check only at renewal)
 - For new schools or those with struggling performance, quality measures may provide guidance on how to improve for both the school and authorizer.
- How to assess quality indicators?
 - Desk audit? Pop-ins (board sessions) Other?
 - Build a category specific for quality checks that is assessed at site visit.
 - Hire site evaluators; have schools pick "vetted" site evaluators that you train; train site evaluators and school leaders
- Check over Compliance checklist. Anything else to add? What due dates make sense? What to pull out specifically? What sources make the most sense?