

Ready to Open - Proposed Improvements to Process Part II

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Background

Office of Charter Schools Actions

- Dozens of hours spent reviewing all aspects of RTO. Research on planning programs in other states and authorizing districts.
- Improved Planning Year (professional development) structures. Increased counseling/technical assistance availability. Increased facility/enrollment check-ins and newly produced materials to facilitate these processes.
- Vastly reduced required submissions (135 to 79).
- Created new shared drive system for RTO cohorts.

Where we are at ...

- OCS Director presented to CSRB regarding Ready to Open proposals in November 2025.
- Request received for additional time to gather feedback/input from stakeholders.
- Email/verbal feedback taken from November through present.
- OCS held a public workshop to gather feedback and answer questions on January 5, 2026.

Current Process “Refresher”

Historical “Minimum Guidelines” and RTO Presentations

- CSRB (previously, CSAB) typically looks at four main areas of “readiness” to determine final RTO status.
- OCS Staff present brief updates starting in March but schools do not appear before CSRB until June.
- OCS presents summary of main components of RTO - enrollment, facility, staffing, budget, RTO submissions. Some schools appear. CSRB votes on final RTO status.

Issue	Minimum Standard
Enrollment	<ul style="list-style-type: none"> • 75% of projected enrollment
Facility	<ul style="list-style-type: none"> • Substantial progress toward receipt of Educational Certificate of Occupancy at least 30 days prior to opening. • Valid contingency plan in place
Budget	<ul style="list-style-type: none"> • Valid break-even budget in place
RTO Progress Report	<ul style="list-style-type: none"> • All areas rated as emerging or developed

RTO Options

1. Complete successfully, receive Charter Agreement;
2. Deny RTO, process ends for applicant, school does not open; OR
3. School requests delay and (if approved) continues in RTO.

Proposed CSRB Improvements

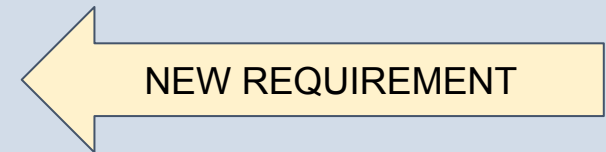
Preface

- Today's proposals aim to provide the CSRB with enhanced insight and comprehensive data, enabling the board to exercise its authority in the most impactful and informed manner possible.
- These recommendations will not diminish CSRB's ultimate authority to make final decisions regarding any RTO school's readiness to open. Rather, establishing clearer minimum guidelines will offer much-needed clarity to schools while simultaneously assisting OCS in effectively counseling boards on what to expect.
- This framework will empower all parties to make appropriate, well-informed decisions within a reasonable timeline, strengthening the overall review process without compromising the board's decision-making power.

Proposal #1 - Phased RTO Presentations

Phased RTO Presentations

- **March, April:** brief updates on RTO school progress from Dr. Norins.
- **May:** RTO schools deemed at risk of opening successfully will present virtually.
- **June:** final CSRB decision regarding RTO status/Charter Agreement receipt. Schools meeting standards (no RTO concerns) are allowed to appear virtually.



Phased RTO Presentations

- At both May and June CSRB presentations, OCS will present “Readiness Reports” on each school.

Readiness Report - Example

Rating Scale:

1 = Not Ready | 2 = Partially Ready | 3 = Substantially Ready | 4 = Fully Ready

II. Operations & Compliance (%)

Readiness Indicator(s)	Evidence/Documentation Reviewed	Comments/Findings	Score (1-4)
Facility secured, compliant with local building/fire codes	Certificate of occupancy		
Safety plan and emergency protocols approved	Safety plan		
Transportation plan in place	Transportation contracts ; policies		
Insurance coverage meets statutory requirements	Insurance certificates		

WHY Phased May and June Presentations?

We recognize this is an added burden on charter boards. However, we believe the benefits vastly outweigh the time required to be available virtually in May and in-person in June. Appearance is limited to those schools not fully ready/meeting standards.

Early Warning System

- Identifies potential problems in May when there's still time for corrective action before the critical June decision
- Allows board to flag concerns about enrollment, staffing, facilities, or finances while schools can still course-correct
- Prevents last-minute surprises in June that could derail opening or force hasty decisions

Phased Decision-Making

- May appearance focuses on preliminary readiness indicators (enrollment trends, key hires, facility progress)
- June appearance confirms final readiness with complete information (final enrollment numbers, signed contracts, operational plans)
- Reduces pressure of making a single high-stakes go/no-go decision with incomplete information

Demonstrates Trajectory and Progress

- Board can assess whether school is on an improving or declining path between May and June
- Shows momentum (or lack thereof) in critical areas like enrollment and recruitment
- Allows board to evaluate how well school responds to May feedback or concerns
- Two touchpoints create stronger incentive for schools to stay on track throughout planning year

Better Data for Final Decision

- May enrollment projections can be compared to June actuals to assess accuracy
- Identifies schools that are barely meeting thresholds and allows for deeper questioning
- Gives board members more confidence in June authorization vote based on observed trends

Risk Mitigation

- Catches financially unviable schools before they open and fail, protecting students and public funds
- Allows for conditional approvals in May with specific benchmarks to hit by June
- Creates opportunity for graceful withdrawal if school recognizes it won't be ready, rather than forced closure after opening

Protects Students and Families

- Families get earlier signals about school viability and can make backup enrollment plans if needed
- Reduces likelihood of mid-year closures or chaotic openings that harm student learning
- Demonstrates commitment to only opening schools truly ready to serve students well

Proposal #2 - Revised Minimum Guidelines

Issue	Minimum Standard
Enrollment	<ul style="list-style-type: none"> • [] of projections by June CSRB Meeting • Is 75% sufficient? Is it a mandatory amount or is there flexibility? How does this intersect with the break-even budget?
Facility	<ul style="list-style-type: none"> • Substantial progress toward receipt of Educational Certificate of Occupancy at least 30 days prior to opening. What evidence is sufficient? • Valid contingency plan in place
Budget	<ul style="list-style-type: none"> • Valid break-even budget in place. • A break-even budget cannot be fewer than [] students. 80 is required by law but OCS suggests 100 as the lowest possible break-even.
RTO Progress Report	<ul style="list-style-type: none"> • All areas rated as emerging or developed OCS Will incorporate into Readiness Report

Proposed: Enrollment Tiers

- OCS proposes revising enrollment into three distinct tiers of enrollment.
- CSRB will not lose the authority to make the final decision on any RTO school's readiness to open. Clearer minimum guidelines would provide clarity to schools and assist OCS in counseling schools on what to expect and make appropriate decisions on a reasonable timeline.

Proposed: Enrollment Tiers

85-100% of Projected Enrollment

Strong Readiness to Open - Demonstrates robust community demand, realistic enrollment projections, and strong financial viability for sustainable operations.

75-84% of Projected Enrollment

Moderate Readiness to Open - Shows adequate community interest but could raise concerns about financial sustainability. May require enhanced oversight and contingency planning to ensure viability.

Under 75% of Projected Enrollment

Not Ready to Open - Demonstrates insufficient demand or unrealistic enrollment projections. School does not meet minimum threshold for financial sustainability and should not be authorized to open. **However, CSRB may consider extenuating factors that provide financial stability reassurances in making its final determination.**

Under 75% Enrolled

Extenuating factors to consider:

- **Conservative break-even budget** - Submitted financial plan shows break-even or positive operating margin at actual enrollment levels (not original projections)
- **Secured contingency funding** - Documented commitments for grants, philanthropic support, or lines of credit sufficient to cover projected shortfalls for at least one full academic year
- **Substantial cash reserves** - Liquid reserves equivalent to 90-180 days of operating expenses at current enrollment
- **Credible enrollment growth plan** - Evidence-based strategy with specific milestones showing realistic path to 75%+ within one year (e.g., confirmed waiting lists, documented late enrollments, demographic trends)
- **Management company backing** - Charter management organization or education management organization provides financial guarantee or assumes financial risk
- **Facility cost advantages** - Significantly reduced or donated facility costs that fundamentally change the financial model

Proposed: Facility Reports

- More detailed reports to be provided through the phased May and June appearances.
- Information including -
 - Certificate of Occupancy timeline
 - Inspection status
 - Construction status
 - Traffic/DOT status or issues
- Schools are already receiving multiple resources/planning tools and require thoughtful contingency planning.

Proposed: Budgets

- Boards must submit and be able to speak to both regular and break-even budgets.
- Break-even budgets include the following minimums:
 - Under 80 students - ONLY for those schools with approved exemption to serve fewer than 80 students.
 - Best practice - 100 students
 - Between 80 and 100 students with supporting documentation such as facility limitations.

Next Steps

- Vote on proposed updates

Summarized:

1. May appearances for those at risk
2. Detailed progress reports
3. Enrollment tiers with supporting documentation
4. Detailed facility reports
5. Updated best practice break-even budget guidelines