



PA House of Representatives

Republican Policy Committee

128, Main Capitol Building
Harrisburg, PA 17120
(717) 260-6144

Rep. Joshua D. Kail
Chairman

PA House Republican Policy Committee Hearing **“How Our Children’s Future is Funded”** **January 30, 2023, at 2 p.m.** **Room 140, Main Capitol Building** **Harrisburg, PA**

2:00 p.m. Welcome and Pledge of Allegiance

School Funding Overview Panel

2:15 p.m. Nathan Benefield
Senior Vice President, Commonwealth Foundation

2:20 p.m. Michael A. Whisman, CPA
Founder and Executive Officer, Charter Choices

2:25 p.m. Joint Questions for School Funding Overview Panel

School Funding Utilization Panel

2:50 p.m. Lawrence F. Jones, Jr., M.Ed.
Chief Executive Officer, Richard Allen Preparatory Charter School
Former President, PA Coalition of Public Charter Schools
Founding Team Member, African American Charter School Coalition

2:55 p.m. Beth Jones, M.Ed., M.B.A., SPHR
Chief Operating Officer/Interim Chief Financial Officer, Insight PA
Cyber Charter School

3:00 p.m. Brian Hayden
Chief Executive Officer, PA Cyber

3:05 p.m. Joint Questions for School Funding Utilization Panel

3:30 p.m. **Final Questions and Closing Comments**



Testifier Biographies

PA House of Representatives Policy Committee Hearing
"How Our Children's Future is Funded"



Nathan Benefield **Senior Vice President, Commonwealth Foundation**

An Ohio native, Nate holds an undergraduate degree in political science and economics and a master's degree in public service management from DePaul University in Chicago. He also completed his doctoral studies (ABD) in political science at Loyola University, also in Chicago.

Nate joined the Commonwealth Foundation in 2005. Now as senior vice president, he provides strategic leadership as well as operational oversight spanning policy analysis, government relations, marketing, and communications.

Nate has researched and written extensively on public policy issues including the state budget, public sector labor reform, government spending and taxes, liquor privatization, education, and economic development. Under Nate's policy leadership, the Commonwealth

Foundation's work on public sector pension law helped drive the bipartisan pension reform of 2017, heralded by the *Wall Street Journal* and *Washington Post* as an example for other states to follow.

Nate has testified numerous times before state legislative committees and is often called upon by legislators and members of the media to provide expertise. He is a frequent commentator on both television and radio, and his writings have appeared across the state and nationally in outlets including the *Philadelphia Inquirer*, *Pittsburgh Post-Gazette*, *Patriot-News*, and *Weekly Standard*.

Nate's favorite rock song and personal motto are both "Don't Stop Believin."

Michael Whisman, CPA

Founder and Executive Officer, Charter Choices

Michael has been serving charter schools since their inception in PA in 1997. He founded a charter school service firm in 2004 and has been a leader in supporting the charter community for more than 20 years. Michael has built relationships since managing the local school audit practice of a large public accounting firm, and now Charter Choices is proud to serve more than 50 charter schools – both brick-and-mortar as well as cyber charter – as clients. Michael has dedicated his career to charter schools, is viewed as an expert in charter school finance, and is often called to testify or engage in shaping activities with key stakeholders in the PA legislature and statewide coalition.



A Certified Public Accountant focused on providing financial management to those who agree that educational choice is a must, Michael is a financial executive, with extensive experience in institutional operations, data/fiscal analysis, and project management.



Lawrence F. Jones, Jr., M.Ed.
Chief Executive Officer, Richard Allen Preparatory
Charter School
Former President, PA Coalition of Public Charter
Schools
Founding Team Member, African American Charter
School Coalition

Lawrence F. Jones, Jr., is a long-time educator, community servant and advocate for public education. He is currently the Founding CEO of the Richard Allen Preparatory Charter School, Inc., a

comprehensive middle charter school located in Southwest Philadelphia.

Mr. Jones began his career as a teacher in the School District of Philadelphia. In 1998, he was selected to the Founding Team of the Richard Allen Preparatory Charter School. He later became the school's Founding Chief Executive Officer in August of 2001. In addition to his duties as CEO of a thriving charter school, Mr. Jones has been an advocate for public charter schools and public education in general. He is the former President of the Pennsylvania Coalition of Public Charter Schools and a Founder and Executive Team Member of the African American Charter School Coalition. Mr. Jones has worked with charter schools across the state, developed relationships with business, political and community leaders, and maintained a positive dialogue with local and state elected officials. In his role as an education advocate, Mr. Jones was selected to participate in President George W. Bush's No Child Left Behind Panel Discussion and Symposium, served as Co-Chair of the Charter School Sub-Committee for Governor Tom Corbett's Transition Team and has served on various boards and committees related to education.

Mr. Jones was educated in the Abington Public District and is a graduate of Morehouse College in Atlanta, GA. He received his Masters of Elementary Education, and Principal's training from Arcadia University in Glenside, PA. He is currently a doctoral candidate at Gwynedd Mercy University.

He lives in Abington, PA with his two children. He is active in the community and a member of the Salem Baptist Church of Jenkintown. In his spare time, Lawrence enjoys practicing Kung Fu, riding motorcycles and spending time with his family.

Beth Jones, M.Ed., M.B.A., SPHR
Chief Operating Officer/Interim Chief Financial Officer,
Insight PA Cyber Charter School

Beth has 30+ years of experience in education serving as a teacher – from toddlers to adults, a community college instructor, a charter school founder and COO, a CFO at Insight PA, and now serves as Insight PA's inaugural COO.

Beth holds a B.A. from Immaculata University, a M.Ed. in Educational Psychology from Widener University, and a M.B.A. from West Chester University. She is a Senior Professional in HR (SPHR) certified by HRCI. Beth serves as the President of the Board of the PA Coalition of Public Charter Schools and is a long-time champion of public school choice in PA.

Beth is married to a public school educator and has two adult sons – both charter school graduates. She is an avid swimmer and loves to read.





Brian Hayden
Chief Executive Officer, PA Cyber

As the CEO of the Pennsylvania Cyber Charter School (PA Cyber), Brian leads one of the oldest and largest public cyber charter schools in the nation. Serving over 11,000 students, PA Cyber is a leader in innovative, online education and provides a public school alternative to families across the Commonwealth.

In addition to being a member of the Pennsylvania Coalition of Public Charter Schools' Board of Directors, Brian also serves as a Commissioner for the Middle States Commission on Elementary and Secondary Schools.

Prior to PA Cyber, Brian was Executive Director for the Community College of Beaver County and has extensive experience working for federal, state, and county governments.

Brian is a Beaver County native who remains active as a community and church volunteer. He received his Bachelor of Arts degree from the University of Dayton and Masters of Public Administration from the University of Pittsburgh Graduate School of Public and International Affairs.



Pa. Public School Funding

KEY POINTS

- Pennsylvania school districts spent \$19,900 per student in 2020–21, ranking 8th in the nation at more than \$4,000 more than the national average.
- State support of public education is up 47 percent over the last decade, reaching an all-time high of \$14.7 billion in 2022-23.
- Pennsylvania exceeds national averages for local, state, and federal per-student funding for public schools.
- Pennsylvania school districts have over \$5.29 billion in general reserve funds and another \$3.6 billion (includes charter schools and other public schools) in unspent federal pandemic aid still sitting in the Treasury.
- Since 2000, Pennsylvania public school enrollment has dropped 6.6 percent (120,000 fewer students); but public schools have added 20,000 more employees (8.7 percent growth), including nearly 40 percent growth among administrators.
- The average Pennsylvania public school teacher earns \$71,000 in salary, the 11th highest in the nation. Meanwhile, school districts spend, on average, \$20,000 per teacher in pension contributions to pay off unfunded liabilities.

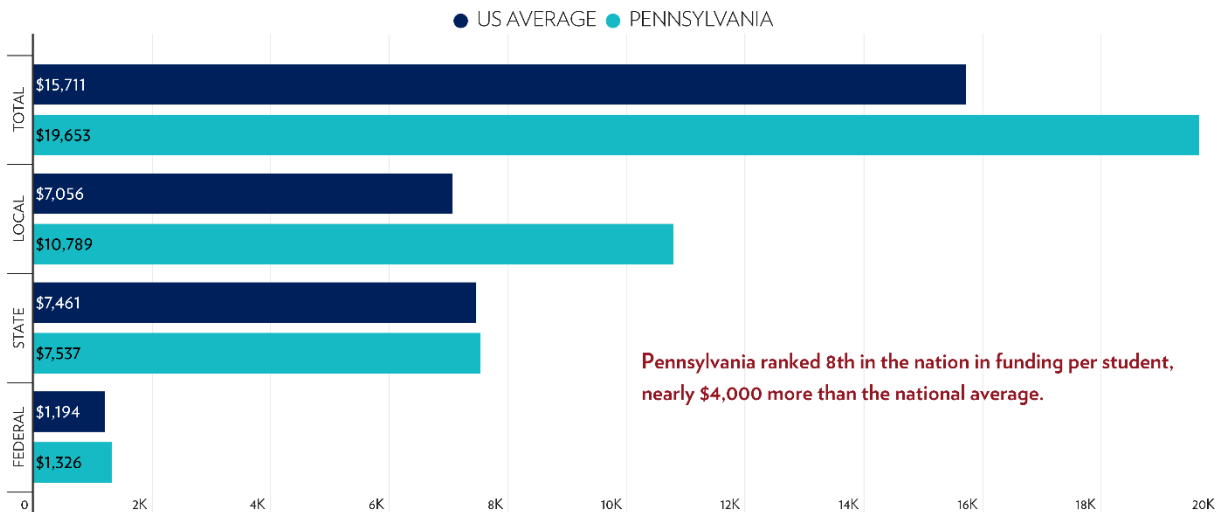
PENNSYLVANIA OUTSPENDS THE NATION ON PUBLIC SCHOOLS

Pennsylvania ranks among the highest spending states on public education.

- At nearly \$20,000 per student, Pennsylvania spends almost \$4,000 more than the national average. The commonwealth's spending per student exceeds the national average for every funding source—federal, state, and local.¹
- As of fiscal year 2020 (the most recent data available), [Pennsylvania ranks](#) 8th in total per student funding, 7th in local per student funding, and 25th in state per student funding.
- Taxpayer-funded lobbyists who advocate for more spending claim that Pennsylvania's "state share" of public school funding is relatively low. Yet, this is a meaningless metric given:
 - Pennsylvania's state funding for public schools on a per student basis exceeds the national average. The "state share" as a percentage is lower only because Pennsylvania's local funding (i.e., school property taxes) is so high.
 - That is, 38 percent of \$20,000 (Pennsylvania's state share of per pupil spending) is more than 47 percent of \$16,000 (the average state share of per pupil spending).
 - Pennsylvania could increase its "state share of funding" ranking by capping local property taxes and keeping overall spending at the national average.

Pa. School Revenue Per Student

Fiscal Year 2020



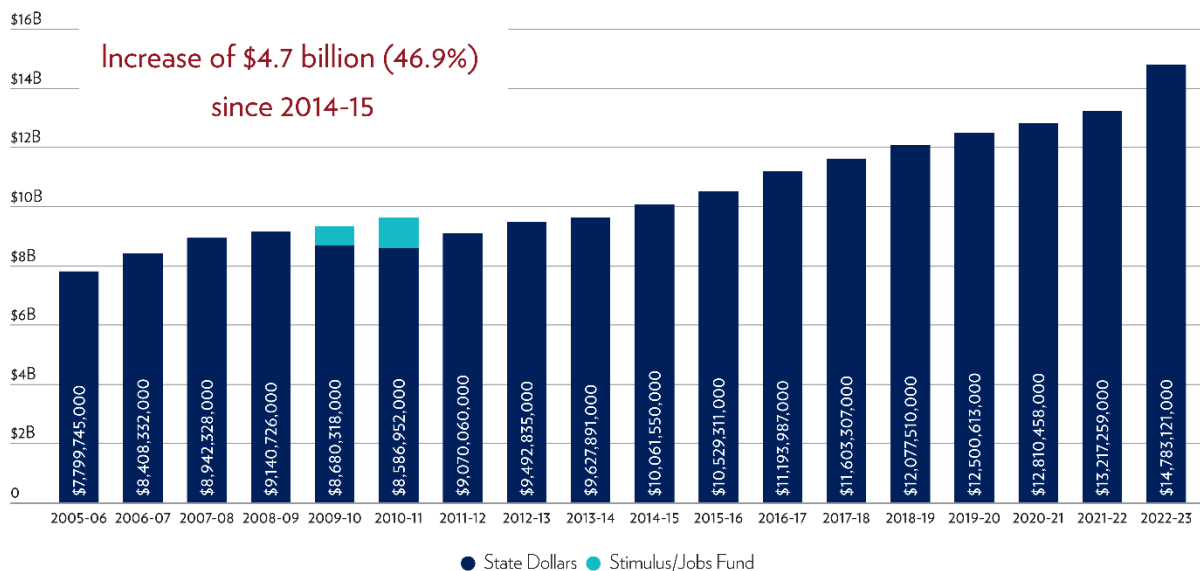
Source: National Center for Education Statistics, Revenues and Expenditures for Public Elementary and Secondary Education: FY 20. <https://nces.ed.gov/pub2022/2022301.pdf>.

PENNSYLVANIA PUBLIC SCHOOL SPENDING IS GROWING

Over the last decade, taxpayer spending on Pennsylvania public schools has consistently increased, reaching all-time highs year after year.

- Pennsylvania per pupil funding for public schools increased in 2020–21, according to [annual data released in April](#) from the Pennsylvania Department of Education (PDE).² This spending increase occurred before Pennsylvania distributed most of its pandemic federal aid and the two largest increases in public school funding ever the 2021–22 and 2022–23 budget.
 - Total public-school district spending from all sources (local, state, and federal) increased to \$33.67 billion in 2020–21, up 32 percent since 2013.
 - Average, statewide funding per student increased to \$19,919 in 2020–21, up 33.9 percent since 2013.
- The Pennsylvania state budget increased [state support](#) of public schools to \$14.7 billion, with a \$650 million increase in 2021–22 and a \$1.5 billion increase in 2022–23.³
 - State support of public schools has increased 46.9 percent since 2014 (since Gov. Wolf took office) with a total increase of \$4.7 billion.

State Support of Public Schools



Source: PA Department of Education, Summary of State Appropriations for Education

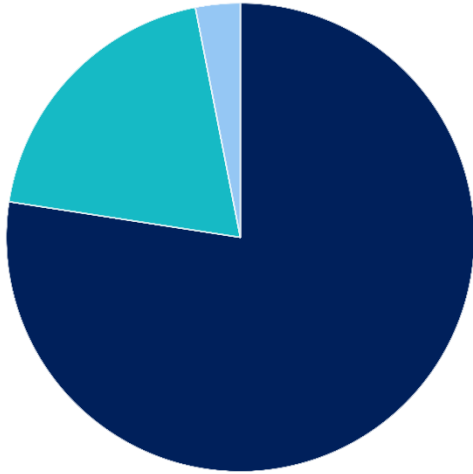
MOST STATE AID IS DISTRIBUTED THROUGH HOLD HARMLESS

While the commonwealth adopted new student-based funding formulas for both basic education and special education, the vast majority of dollars—more than 75 percent of each appropriation in 2022-23—are distributed through the baseline allocation, not the new funding formula.⁴ This baseline was frozen in 2013-14 after decades of “hold harmless,” in which districts were guaranteed the same amount of state revenue as the prior year, plus a percentage of the increase.

That is, the vast majority of state funds to districts are tied to present-day enrollment numbers, demographics, or special education designations.

Basic Education

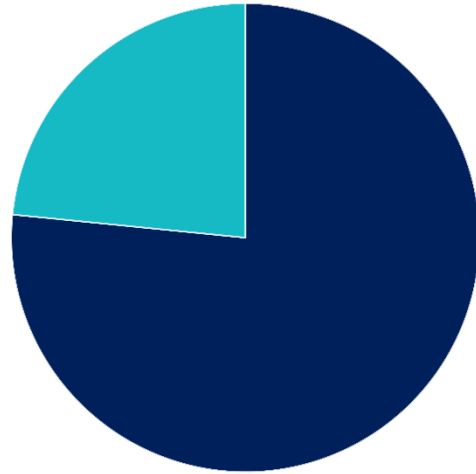
Level Up Supplement 3.08%
Student Based Formula 19.49%



Baseline (2013-14) 77.43%

Special Education

Student Based Formula 23.42%



Baseline (2013-14) 76.58%

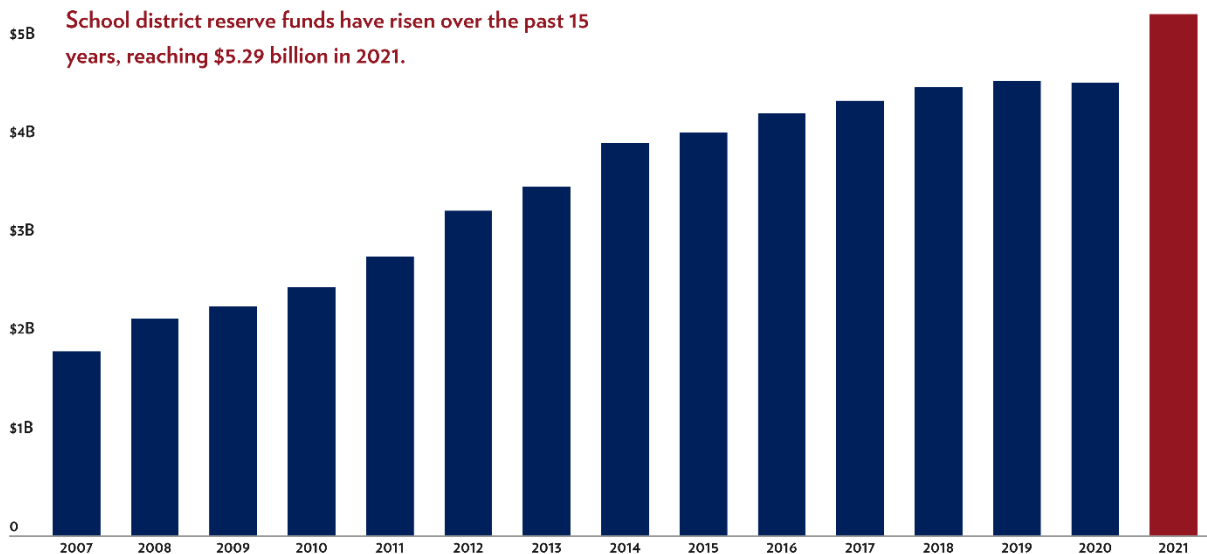
Source: PA Department of Education, 2022-23 Estimated Basic Education Funding; 2022-23 Estimated Special Education Funding

STOCKPILING RESERVE FUNDS

While some rainy-day funds are important for weathering unforeseen events, school districts have excessive stockpiles of taxpayer resources.

- PDE data reveals that public school districts collectively stockpiled \$5.29 billion in reserve funds in 2020-21, up 32.7 percent since 2013.⁵
- School district reserves consist of assigned, unassigned, and committed funds. While the intent for assigned funds may be for capital improvements, reserve funds are fungible, which allows school districts to repurpose their use.
- The state's previous [Auditor General](#) recommended that reserve funds be no more than 20 percent of the school district's total spending.⁶ Remarkably, almost half of Pennsylvania school districts—239 out of the 500 districts—have reserve funds that exceed 20 percent of their spending.
- Pennsylvania school districts, on average, have reserve funds equaling 22.56 percent of their total spending.

School District Fund Reserves



Source: Pennsylvania Department of Education, Detailed Annual Financial Reports, "General Fund Balance 1996-97 to 2020-2021." General Fund Balance includes Assigned, Committed, and Unassigned funds.

FEDERAL "REOPENING" FUNDS REMAIN UNTOUCHED

Calls for increases in state education funding come even as public schools sit on billions of unspent federal aid. This leftover federal money is *in addition* to the billions school districts hold in general reserves.

- Since 2019, Pennsylvania public schools were granted more than \$6.7 billion in federal pandemic aid through three packages: Federal Coronavirus Aid, Relief, and Economic Security (CARES) Act, Coronavirus Response and Relief Supplemental Appropriations Act (CRRSA), and American Rescue Plan (ARP).
- As of January 2022, Pennsylvania public schools (including district and charter schools) still have [\\$3.6 billion](#) in unspent federal pandemic aid sitting in State Treasury accounts.⁷

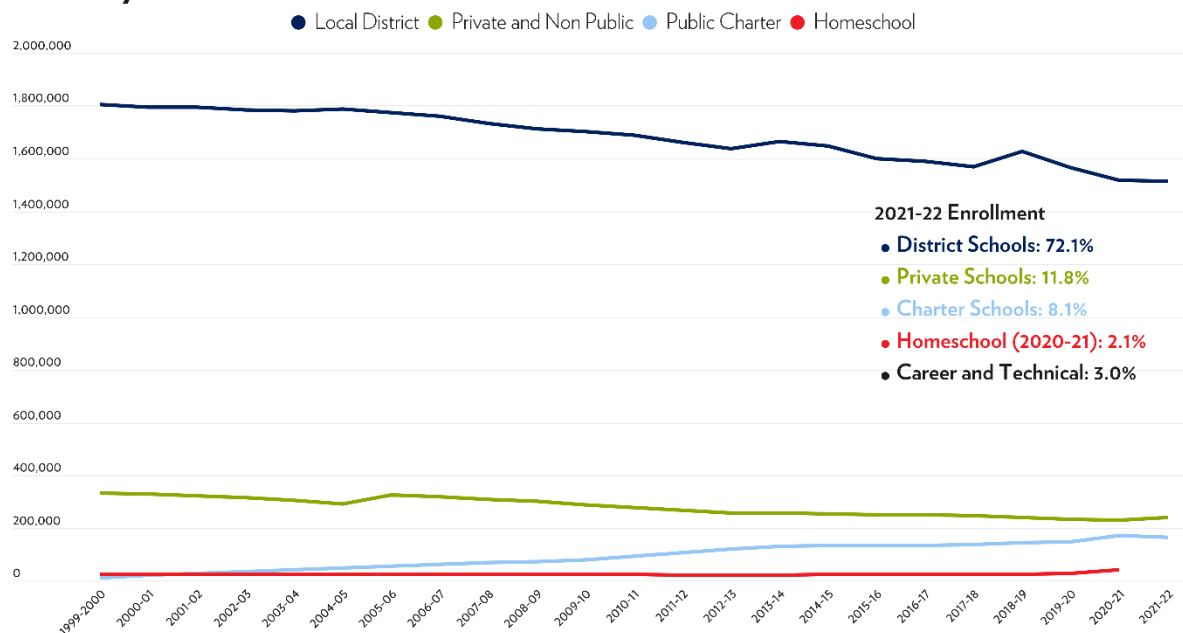
PRE K-12 SCHOOL ENROLLMENT IS DECLINING

Pennsylvania public schools have experienced overall reductions in student enrollment. Meanwhile, the number of parents choosing to homeschool their children has dramatically increased, fueled in large part by the COVID-19 pandemic.

- Pennsylvania public schools lost more than 120,000 students, or 6.6 percent from 1999-2000 to 2021-22.⁸
 - District schools lost more than 289,000 students, or 16.1 percent; while charter schools grew by 152,000.
 - Nearly 60,000 students are enrolled in Career and Technical Schools or Intermediate Unit Programs.

- Private school enrollment also dropped during this time frame, with 82,000 fewer students enrolled in private and nonpublic schools, a 28.1 percent decline.⁹
- Homeschooling rose by 75.5 percent from 1999-2000 to 2020-21—with a major increase in 2020-21 during the COVID-19 pandemic.¹⁰
- The largest dip in school district enrollment occurred after 2019–20, following the start of the COVID-19 pandemic, with almost 51,000 students leaving school districts.¹¹
 - In Philadelphia alone, nearly 11,000 students, or 8.7 percent, have left the school district since the start of the pandemic.¹²

Pennsylvania PreK-12 School Enrollment Trends



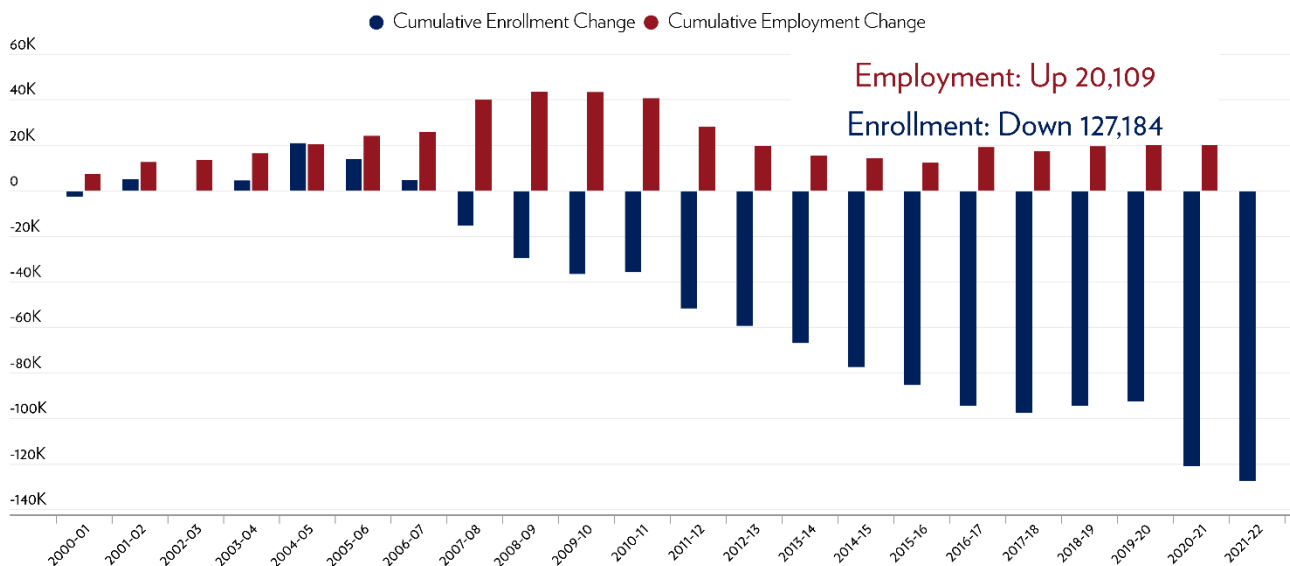
PUBLIC SCHOOL EMPLOYMENT IS GROWING

Although student enrollment has declined across Pennsylvania, public school employment of teachers and administrators has increased. Individual school districts largely retain funding despite declines or increases in student enrollment.

- From 1999-2000 to 2020-21, even as enrollment declined, Pennsylvania public schools added 20,109 employees, a growth rate of 8.7 percent.¹³
 - Public schools added more than 6,500 classroom teachers (5.7 percent growth) and 4,760 support staff (5.1 percent)
 - The largest growth was in all other categories of “professional staff”—including administrators, coordinators, and “other professional staff.” Public schools added 8,750 non-teacher professional staff, a growth rate of 38.5 percent
- At the same time, the student-to-teacher ratio in public schools dropped from 15.7 to 1 to 13.9 to 1.

- This student-to-teacher ratio varies by school district, from 18.7 to 1 at Greater Nanticoke Area in Luzerne County down to 4.6 to 1 at Harmony Area in Clearfield County.
- The ratio of students to total employment dropped from 7.8 to 1 to 6.7 to 1.
- Some school districts are experiencing teacher shortages and difficulty hiring teachers. Focusing funding on school districts instead of students exacerbates teacher hiring problem.
 - Statewide, there are more teachers (as well as more administrators and more support staff) but fewer students.
 - Even school districts with shrinking enrollment have added teachers and other staff or retained more than their enrollment required.
 - This over-hiring had led to shortages in school districts that face greater challenges in teacher hiring.
 - This hiring problem is because funding doesn't follow students. School districts with shrinking enrollment have continued to get funding increases (due to "hold harmless" provisions).

Pa. Public School Enrollment and Staff Growth Since 2000



Source: Bureau of Labor Statistics: <https://www.bls.gov/cpi/>

PAST PENSION LIABILITIES LIMIT TEACHER PAY

Pennsylvania teachers are, on average, among the highest paid teachers nationally. Employee benefit costs have skyrocketed because of past policy decisions—supported by the school unions—to underfund the school pension system and push off needed pension reform.

- The average salary for a classroom teacher in Pennsylvania public schools was \$71,479 as of 2020-21, according to the Pennsylvania Department of Education.¹⁴
 - This ranks Pennsylvania 11th highest in average teacher pay, according to the NEA.¹⁵
- While teacher pay is relatively high compared to the national average, the cost of employee benefits has skyrocketed, crowding out salary increases.
 - In 2020-21, Pennsylvania public schools spent \$8.7 billion on employee benefits. This comes to nearly \$35,000 per employee.¹⁶
 - From 2011-12 to 2020-21, total public school spending on salaries increased 15 percent; meanwhile spending on employee benefits increased 82 percent, as retirement contributions (i.e., pension payments) increased 342 percent.¹⁷
- For school year 2022-23, the pension contribution rate for all Pennsylvania public schools will be 35.26 percent;¹⁸ all public districts must contribute 35 percent of salaries (in aggregate) towards that state-run pension plan for school employees (PSERS).
 - The lion's share of this contribution rate—28.24 percent— isn't to increase employee benefits, but to pay off past unfunded pension liabilities (or debt).
 - That rate (28.24 percent) equals \$20,186 when imposed on the average teacher salary.
 - If Pennsylvania had enrolled all employees in a defined contribution plan, like a 401k, there would be no pension debt to pay off. Had lawmakers done so, Pennsylvania public schools could be paying teachers an additional \$20,000 per year, without increasing overall spending.

TRACKING SPENDING AND STUDENT PERFORMANCE

While spending on public schools has soared, [student performance](#) still lags—with 78 percent of Pennsylvania eighth-grade students not proficient in math and 47 percent not proficient in language arts.¹⁹ Simply increasing taxpayer funding to public schools does not improve academic results.

- A [2022 report](#) on the PDE's performance by the Independent Fiscal Office found that “the data suggests there is little or no correlation between the current expenditures spent per student and the share of students that score proficient or above on standardized tests.”²⁰
- [Dr. Eric Hanushek](#) of Stanford University found that “the available evidence suggests that there is no relationship between expenditures and the achievement of students.” Hanushek has also examined the impact of education funding adequacy lawsuits in other states. His book with Alfred Lindseth, an attorney and author with Education Next, [notes](#) that even when these lawsuits succeed (i.e., the courts ordered more spending on public schools), academic performance does not improve.²¹
- A [2014 nationwide study](#), by the Cato Institute, examined the correlation between state school spending and academic performance over a 40-year time period. The research reveals “essentially no link between state education spending (which has exploded) and the performance of students at the end of high school (which has generally stagnated or declined).”²²

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- ¹ National Center for Education Statistics, "Revenues and Expenditures for Public Elementary and Secondary Education: FY 20", May 2022, <https://nces.ed.gov/pubs2022/2022301.pdf>.
- ² Pennsylvania Department of Education, AFR Data Files, 2020–21, <https://www.education.pa.gov/Teachers%20-%20Administrators/School%20Finances/Finances/AFR%20Data%20Summary/Pages/default.aspx>.
- ³ Pennsylvania Department of Education, Summary of State Appropriations for Education, 2022–23, <https://www.education.pa.gov/Teachers%20-%20Administrators/School%20Finances/Education%20Budget/Pages/default.aspx>.
- ⁴ Pennsylvania Department of Education, 2022-23 Estimated Basic Education Funding; 2022-23 Estimated Special Education Funding, <https://www.education.pa.gov/Teachers%20-%20Administrators/School%20Finances/Education%20Budget/Pages/default.aspx>.
- ⁵ Pennsylvania Department of Education, AFR Data Detailed, General Fund Balance 2020-21, <https://www.education.pa.gov/Teachers%20-%20Administrators/School%20Finances/Finances/AFR%20Data%20Summary/Pages/AFR-Data-Detailed-.aspx>.
- ⁶ Jan Murphy, "School districts reserve funds continue to grow, amassing \$4.3.billion in 2014-15, June 2016, https://www.pennlive.com/politics/2016/06/school_districts_reserve_funds.html.
- ⁷ Pa. Treasury Accounting Bureau, Status of Appropriation, Year to Date through Accounting Period 11 and Fiscal Year 2021, "COVID-ESSER-LEA", May 2022 report, <https://www.patreasury.gov/tabs/>.
- ⁸ Pennsylvania Department of Education, Public School Enrollment Reports, <https://www.education.pa.gov/DataAndReporting/Enrollment/Pages/PublicSchEnrReports.aspx>.
- ⁹ Pennsylvania Department of Education, Private and Nonpublic School Enrollment Reports, <https://www.education.pa.gov/DataAndReporting/Enrollment/Pages/PrivateNPEnrRpts.aspx>.
- ¹⁰ Pennsylvania Department of Education, Home School Education, <https://www.education.pa.gov/DataAndReporting/HomeSchool/Pages/default.aspx>.
- ¹¹ Pennsylvania Department of Education, Enrollment Reports, <https://www.education.pa.gov/DataAndReporting/Enrollment/Pages/default.aspx>.
- ¹² https://www.philasd.org/performance/programsservices/open-data/school-information/#district_enrollment
- ¹³ Pennsylvania Department of Education, Professional Staff Summary, <https://www.education.pa.gov/DataAndReporting/ProfSupPers/Pages/ProfStaffSummary.aspx>; Pennsylvania Department of Education, Support Staff Summary, <https://www.education.pa.gov/DataAndReporting/ProfSupPers/Pages/SupportStaffSum.aspx>.
- ¹⁴ Pennsylvania Department of Education, Professional Staff Summary, <https://www.education.pa.gov/DataAndReporting/ProfSupPers/Pages/ProfStaffSummary.aspx>.
- ¹⁵ National Education Association, Rankings and Estimate, https://www.nea.org/sites/default/files/2022-04/2022_percent20Rankings_percent20and_percent20Estimates_percent20Report.pdf.
- ¹⁶ Pennsylvania Department of Education, Summaries of Annual Financial Reports: Detailed, <https://www.education.pa.gov/Teachers%20-%20Administrators/School%20Finances/Finances/AFR%20Data%20Summary/Pages/AFR-Data-Detailed-.aspx>.
- ¹⁷ Ibid.
- ¹⁸ Pa. Public School Employees Retirement System, Employer Contribution Rates, <https://www.psers.pa.gov/FPP/Publications/General/Pages/Employer-Contribution-Rates.aspx>.
- ¹⁹ Pennsylvania Department of Education, PSSA Results 2021, <https://www.education.pa.gov/DataAndReporting/Assessments/Pages/PSSA-Results.aspx>.
- ²⁰ Independent Fiscal Office, Performance Based Budget, Department of Education, January 2022, http://www.ifo.state.pa.us/download.cfm?file=Resources/Documents/PBB_2022_PDE_REPORT_Amended.pdf.
- ²¹ Eric Hanushek, "Throwing Money at Schools," *Journal of Policy Analysis and Management*, Autumn 1981, <http://hanushek.stanford.edu/publications/throwing-money-schools>; Eric Hanushek and Alfred Lindseth, *Schoolhouses, Courthouses, and Statehouses: Solving the Funding-Achievement Puzzle in America's Public Schools*, (Princeton: Princeton University Press, 2009).
- ²² Andrew Coulson, "State Education Trends: Academic Performance and Spending over the Past 40 years," March 2014, Cato Institute, https://www.cato.org/sites/cato.org/files/pubs/pdf/pa746_2.pdf.



Charter School Funding

JANUARY 30, 2023



Objectives

Understand how charter schools are funded in PA for both regular and special education.

Understand the history of special education funding for districts.

Understand the 2013 Special Education Funding Commission's recommendations.



Independent organization serving
charter schools and related
entities in Pennsylvania for
18+years.

Currently serving more than 60
charter client schools in PA

About Michael Whisman

- Certified Public Accountant in PA
- First Charter School Client - 1998
- Founder of Charter Choices – 2004

Michael Whisman, CPA

Charter Choices, Inc.

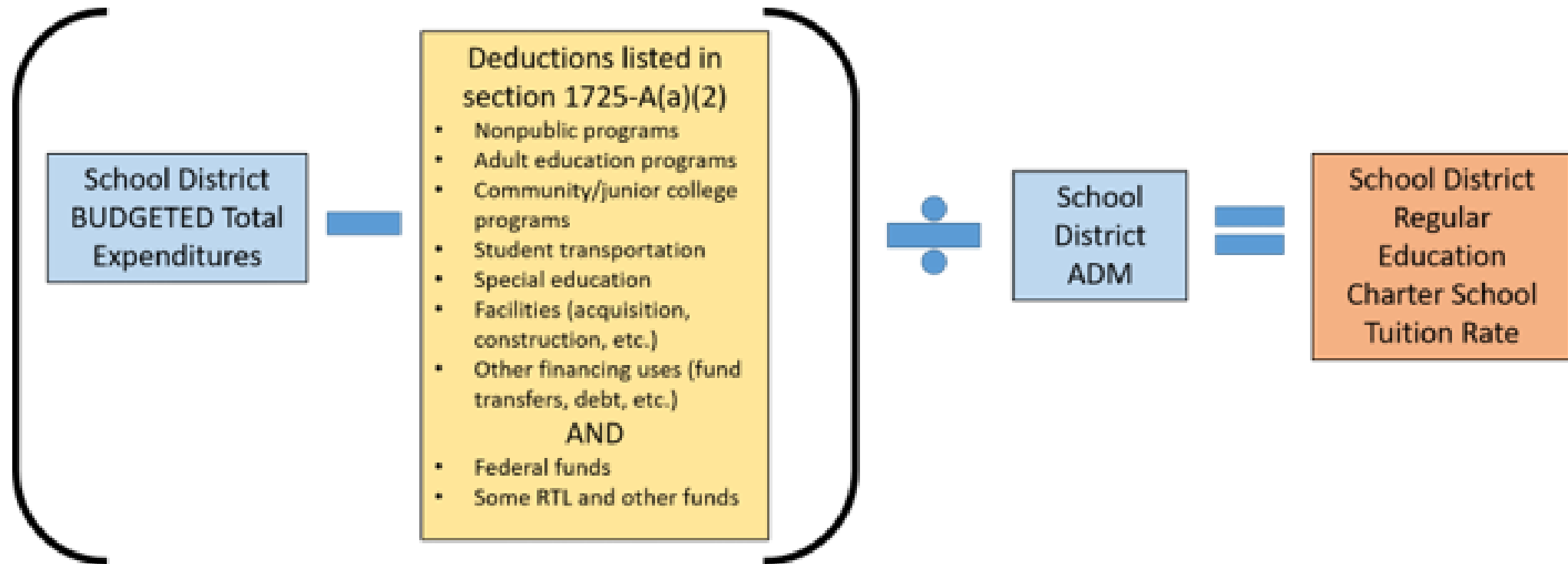
215.481.9777 ext. 124

MWHISMAN@CHARTERCHOICES.COM

School District and Charter School Funding are Fundamentally Different (as are the students they serve)

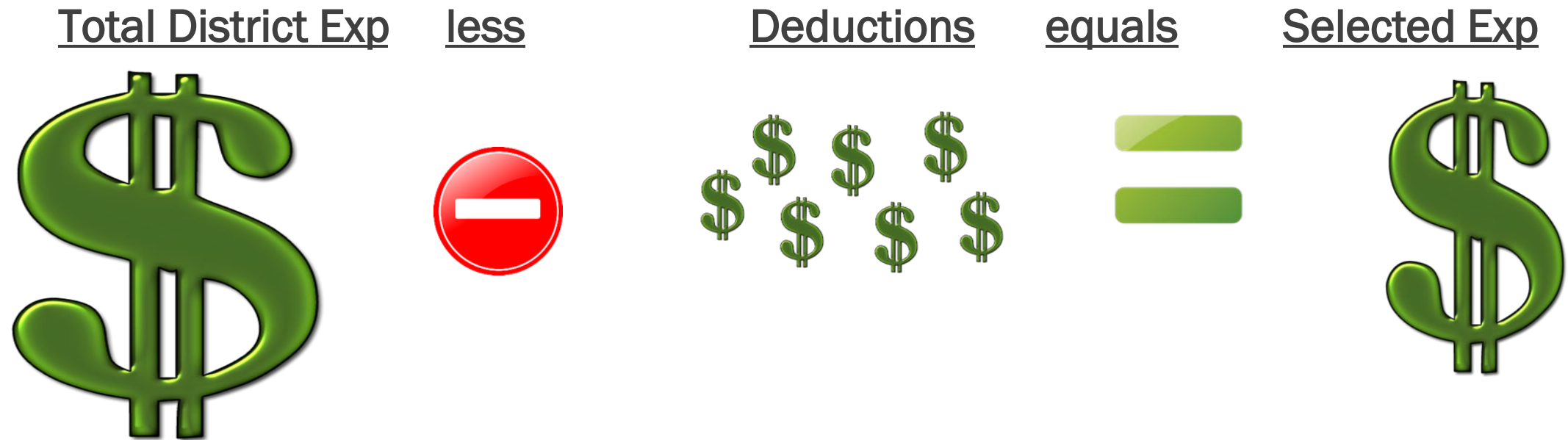
- Average Statewide Total Revenue Per Student (from PSBA's "A Closer Look")
 - School Districts in PA = \$17,983
 - Charter Schools in PA = \$15,751
- Average Statewide Enrollment by Economically Disadvantaged Status
 - School Districts in PA = 44% Economically Disadvantaged
 - Charter Schools in PA = 63% Economically Disadvantaged
- Average Statewide Enrollment by Races
 - School Districts in PA = 68% White & 32% Non-White
 - Charter Schools in PA = 32% White & 68% Non-White
- Average Statewide Teaching Staff by Races
 - School Districts in PA = 95% White & 5% Non-White
 - Charter Schools in PA = 80% White & 20% Non-White

PDE-363 Charter School Funding – Regular Education



PDE-363 Charter School Funding – Regular Education

The PDE a form, PDE-363, for Districts to calculate tuition rates. Each year, every District calculates a rate for charter school regular education students and a rate for charter school special education students. (500 reg & 500 special education rates)

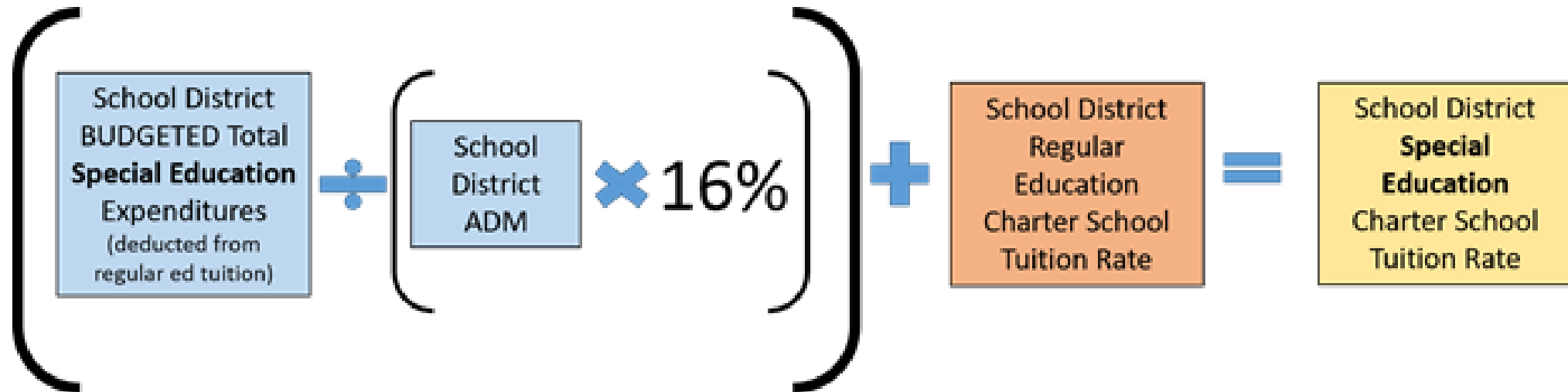


PDE-363 Charter School Funding – Regular Education

The PDE a form, PDE-363, for Districts to calculate tuition rates. Each year, every District calculates a rate for charter school regular education students and a rate for charter school special education students. (500 reg & 500 special education rates)



PDE – 363 Charter School Funding - Special Education



PDE-363 Charter School Funding – Special Education

Special Education Exp multiplied 16% of Total Students equals Spec Ed Charter Tuition



Charter School Funding – PDE -363

PDE-363 (4/2018)

School District Name	County Name Allegheny	AUN
Contact Person	E-mail Address	Telephone Number Extension
Signature of Superintendent		Date

Funding for Charter Schools for 2018-2019 School Year
Calculation based on budgeted expenditures and average daily membership
For 2017-2018 School Year (immediately preceding year)

FOR NONSPECIAL EDUCATION STUDENTS	
TOTAL EXPENDITURES	<u>\$98,063,580.00</u> (a)
Minus TOTAL DEDUCTIONS (see page 2)	<u>\$41,153,039.00</u> (b)
SELECTED EXPENDITURES (a - b)	<u>\$56,910,541.00</u> (c)
AVERAGE DAILY MEMBERSHIP	<u>4,732.826</u> (d)
FUNDING FOR NONSPECIAL EDUCATION STUDENTS (c / d) (SELECTED EXPENDITURES PER AVERAGE DAILY MEMBERSHIP)	<u>\$12,024.64</u> (e)

FOR SPECIAL EDUCATION STUDENTS	
1200 SPECIAL EDUCATION EXPENDITURES	<u>\$22,806,692.00</u> (f)
Minus SPECIAL EDUCATION DEDUCTIONS (see page 2)	<u>\$319,688.00</u> (g)
SELECTED EXPENDITURES (f - g)	<u>\$22,487,004.00</u> (h)
AVERAGE DAILY MEMBERSHIP multiplied by 0.16 (d x 0.16)	<u>757.252</u> (i)
SPECIAL EDUCATION EXPENDITURES divided by 0.16 AVERAGE DAILY MEMBERSHIP (h / i)	<u>\$29,695.54</u> (j)
FUNDING FOR SPECIAL EDUCATION STUDENTS (e + j)	<u>\$41,720.18</u> (k)

Provide a copy of this form to each charter school in which residents of the school district are enrolled.

PDE-363 (4/2018)

2018-2019 School Year

School District Name	County Name Allegheny	AUN
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The following amounts are to be subtracted from the TOTAL EXPENDITURES reported on line (a). Deduct only the federal portion of expenditures except for the following account codes: 1200, 1500, 1600, 1700, 1800, 2700, 4000 and 5000.

NOTE: Only deduct the federal portion of expenditures if included in the Total Expenditures reported on line (a) on page 1.

DEDUCTIONS FROM TOTAL EXPENDITURES	
1100 Regular Education (federal only)	<u>\$2,089,586.00</u>
1200 Special Education	<u>\$22,806,692.00</u>
1300 Vocational Education (federal only)	
1400 Other Instructional Programs (federal only)	
1500 Nonpublic School Programs	<u>\$133,691.00</u>
1600 Adult Education Programs	
1700 Community / Junior College Programs	
1800 Prekindergarten (federal only)	
1800 Prekindergarten (state PreK counts only)	<u>\$153,000.00</u>
2100 Pupil Personnel (federal only)	<u>\$400,947.00</u>
2200 Instructional Staff (federal only)	<u>\$261,196.00</u>
2300 Administration (federal only)	
2400 Pupil Health (federal only)	
2500 Business (federal only)	
2600 Operation and Maint. of Plant (federal only)	
2700 Student Transportation	<u>\$7,254,160.00</u>
2800 Central (federal only)	
2900 Other Support (federal only)	
3000 Operation of Noninstructional (federal only)	<u>\$19,770.00</u>
4000 Facilities Acquisition, Constr. and Improvement	
5000 Other Financing Uses	<u>\$7,769,290.00</u>
7505 Ready to Learn Block Grant	<u>\$264,707.00</u>
TOTAL DEDUCTIONS	<u>\$41,153,039.00</u> (b)

DEDUCTIONS FROM SPECIAL EDUCATION EXPENDITURES	
1200 Special Education (federal only)	<u>\$319,688.00</u>
1280 Early Intervention (state only)	
TOTAL SPECIAL EDUCATION DEDUCTIONS	<u>\$319,688.00</u> (g)

District Special Education Fundings Prior to 1991

Pennsylvania was the only state in the nation to fund all the “excess costs” of educating children with disabilities

- i. School district would, in addition to completing its general education budget, complete and submit its special education budget to the state.
- ii. State would then calculate the regular and special education expenditures per average daily membership (“ADM”) for both elementary and secondary schools.
- iii. The difference between the regular and special education per pupil expenditure became the basis for the state aid.
- iv. Pennsylvania was experiencing an increasing number of students served by special education programs.

The Initial Attempt at Special Education Funding Reform

Act 25 of 1991:

- ✓ Allocations based on Average Daily Membership (ADM); districts receive a fixed amount based solely on overall ADM
- ✓ Divided into two categories: mildly impaired and severely impaired
- ✓ Presumed identification rates: 15% mildly impaired; 1% severely impaired = total percentage of 16%

The formula provides a hold harmless provision: ALL DISTRICTS, REGARDLESS OF THEIR ENROLLMENT, ARE GUARANTEED TO RECEIVE AT LEAST THE AMOUNT RECEIVED IN THE PRIOR YEAR. IN ADDITION, THERE ARE GUARANTEED MINIMUM INCREASES FOR DISTRICTS BETWEEN 1%-5%, VARYING EACH YEAR

The Secretary of Education withheld 1% of state special education funds as a contingency reserve to pay for extraordinarily expensive special education programs

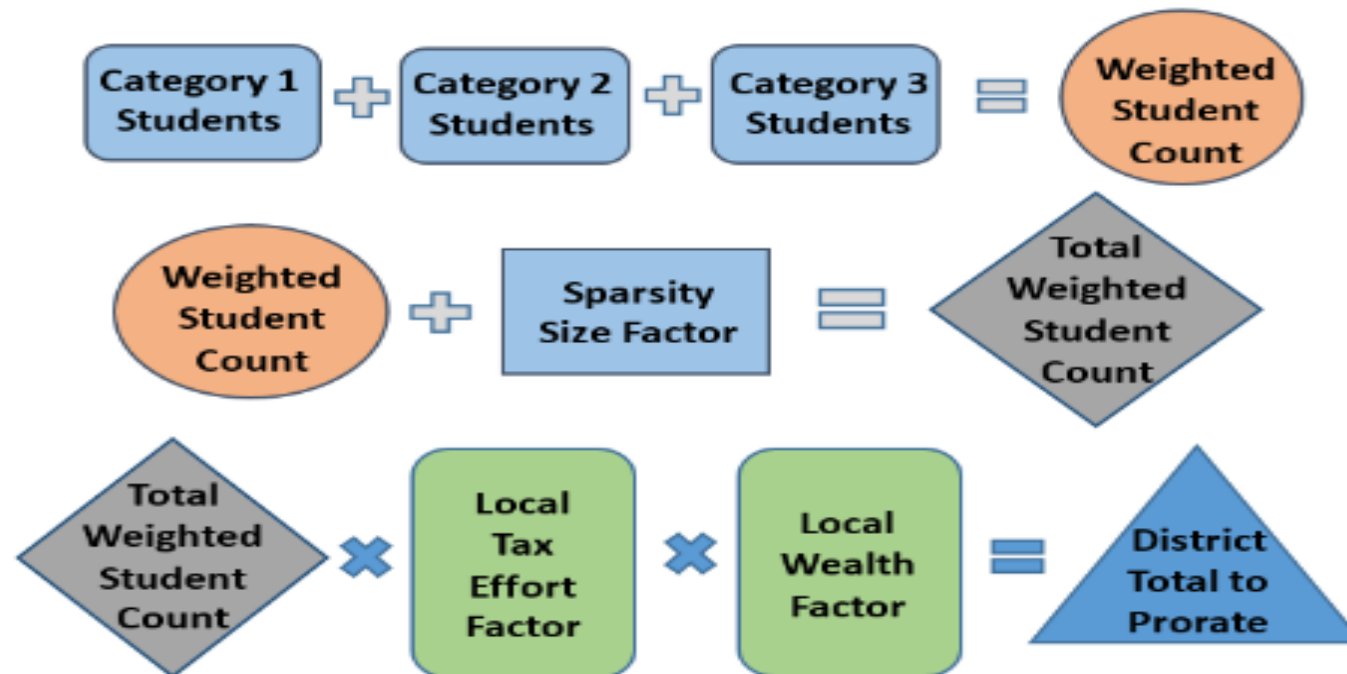
2013 Special Education Funding Commission

- Act 3 of 2013 unanimously passed by the Senate and House of Representatives and was signed by Governor on April 25, 2013.
- Hold Harmless Provision - The special education formula to be developed by the Commission was to determine only the distribution of any increase in special education funding among the school districts in the Commonwealth above the amount of special education funding in the base year (2010-2011) and is not to be used for any other purpose.
 - Funding mechanism used to guarantee that no district receives less funding than it did the prior year.
 - Only “new” funding \$\$\$ go through the formula created by the funding commission.
 - **Districts with decreasing numbers of special education students (and less students in general) receive the same amount of funding based prior census numbers.**

2013 Special Education Funding Commission - Recommendations

- Commission developed a three-tiered formula recommendation
- Reflects the cost categories of students eligible for special education and the intensity in the range of services required to meet their need
 - ✓ Category 1: reflecting the least intensive range of services; <\$25,000/year
 - ✓ Category 2: includes students with a moderate range of services; >\$25,000 and <\$49,999/year
 - ✓ Category 3: includes students with the most intensive range of services; >\$50,000 and up
- Each local education agency (LEA) reports a student count for each category based on annual data that is reported to PDE (Act 16 reporting)
- A weighting factor is to be applied to each of the three different cost categories:
 - ✓ Category 1: 1.51
 - ✓ Category 2: 3.77
 - ✓ Category 3: 7.46
 - ✓ Each category is based on special education costs in excess of regular education costs

Recommended Funding Formula - Districts



Recommended Funding Formula - Charter Schools

- Apply the category percentage to the PDE-363 calculation for regular education.
 - ✓ For a category 1 student in a district with a regular education rate of \$10,000, the additional special education funding would be \$5,100 (1.51%).
 - ✓ The charter school would be required to spent \$25,000 in special education costs before moving to category 2. Essentially the charter school will be underfunded \$19,900 (\$25,000 - \$5,100).
- Imposing this recommendation, without a hold harmless provision would close Charter Schools.

Additional Recommendations

- Although the school districts would receive changes in funding based on a proposed formula, again the Act required that the districts receive state funding for special education in an amount that does not exceed the base year (2010-2011), allocated in the same manner as the state funding was allocated in the base year, i.e., the hold harmless provision.
- The recommendation for charter schools and cyber charter schools was to apply the same principals to all LEAs, both district and charter schools alike. However, there was only a three-year phase in proposed for charter schools (Report, p. 57). In addition, if charters had costs over and above that provided in category 2 and/or category 3, the charter schools could file evidence of those expenses to seek reimbursement (“substantiation” requests).

Post 2013 Commission

- Only NEW monies appropriated using the formula; district (not charter) hold harmless for existing special education funds.
- Passed in 2014: Act 126 of 2014 (state budget). Went into effect for the 2014-2015 fiscal year.
- The recommendation to apply the formula to charter schools was not adopted

Thank You!

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Lawrence F. Jones, Jr.

CEO, Richard Allen Preparatory Charter School and Executive Team Member of the African American Charter School Coalition

House Republican Policy Committee Meeting

Monday, January 30, 2023

Good afternoon, ladies, and gentlemen, and thank you for the opportunity to appear before you today on a very important subject.

My name is Lawrence Jones, and I am the founding Chief Executive Officer of the Richard Allen Preparatory Charter School located in Southwest Philadelphia, which opened in September 2001. Over the past twenty-one years, I have been involved in advocating for public schools and public charter schools on the local, state, and federal level. There has been a call for a change to the charter school law over the past few years. There have also been policy changes that have impacted charter schools and the 160,000 students enrolled in the schools. Any future decisions should be made with a full and balanced understanding of charter schools and how they work. I would like to speak briefly today about three important aspects of charter schools in Pennsylvania: charter funding, special education/intermediate units, and accountability.

Funding Issues:

Let's start with the funding issues. I find it hard to believe that many school boards, superintendents, and special interest groups are vocal about reducing funds for charter schools but are silent when it comes to more serious and long-standing issues of funding inequity. For example, real estate redlining and deed restrictions that created communities of affluence and areas of poverty. While these practices have been uncovered and made illegal, the fact that school funding is driven by property taxes means that a legacy of inequity exists for public education in our commonwealth. Many suburban school districts that continue to benefit from these practices have passed resolutions related to reducing charter school funding, yet they are silent on issues of inequity brought about by red lining. This hypocrisy is made worse by the fact that charter schools disproportionately enroll poor and minority students and are most likely found in districts with high poverty rates, and the calls for reduced charter school funding would once again divert public funds from the students most in need.

You will hear specific details about charter school funding from another testifier. In short, the majority of charter school funding is in the form of a per pupil allotment that is based on the previous year expenditures of the local school district in which each student resides. The allotment is the aggregate of district expenditures less a set of deducted line items. The resulting amount is divided by the average daily membership of the district. The resulting allotment is approximately 78% of what students in

district schools receive. These funds must pay for all charter school facilities, utilities, insurances, personnel costs, supplies, materials, and services. Public charter schools do not receive facilities funding, nor do they have access to any bond intercept provisions that would enhance credit ratings and significantly reduce any debt service payments used to obtain and/or renovate facilities. Additionally, because charter school funding is based upon district expenditures any annual or accrued revenues over expenditures are not passed on to charters. This means the more than \$5 billion in district fund balances are insulated from charter schools. The concept of charters being over-funded is simply false.

Special Education Funding and Intermediate Units

When charter school special education expenditures are compared to revenues, the devil is in the details. For example, as the CEO of a small charter school, I am often involved in programming, consultation, and even direct service for students with disabilities. However, a portion of my salary is never calculated in our special education expenditures. Unlike a traditional school district, staffing differences in charter schools means that many special education services are not coded as special education expenditures. This is just one reason why an isolated change in special education funding for charter schools will result in disastrous cuts to charter schools that will impede their ability to provide services to children with special needs.

Charter schools are already receiving less resources in the form of support for students' special needs provided by Intermediate Units. Act 102 of 1970 created the system of 29 intermediate units (IU) which replaced county superintendents as of July 1, 1971. Intermediate units were developed to achieve economies of scale in the provision of educational services. In 1997, twenty-six years after the inception of intermediate units, the General Assembly created a Joint State Government Commission to study intermediate units. The twenty-nine-page report was presented in December of 1997. That report had no mention of charter schools which came into existence in that same year in Pennsylvania. It has been another twenty-six years since that joint commission and charter schools have expanded to serve more than 160,000 students across the commonwealth. However, there has been no serious consideration of how intermediate units serve charter schools and the students they enroll.

In Philadelphia, charter schools receive very few services from their intermediate unit (IU 26). In fact, many charter schools are forced to go to surrounding intermediate units to purchase services and resources. A recent survey of Philadelphia charter schools revealed that 79% of schools surveyed indicated receiving no technical support, guidance, or services from IU 26. Of the 21% that reported receiving services, the services provided were state reporting guidance, a monthly meeting, data reporting, and training on PVAAS and analyzing district-wide survey results. 74% of responding schools reported purchasing services from other intermediate units. These services included professional development, special education training, coaching, contracted teachers, software, student placement, and data analysis. For twenty-six years, Intermediate Unit 26 has received significant funding (generated in part by charter school students) to provide services to charter schools, but very few services have ever been granted. Before looking at the removal of special education services it would be significantly more beneficial to children to ensure that all schools had the services and resources that were provisioned by the General Assembly.

Equitable Accountability

Charter school opponents often complain that charter schools lack accountability. There are more than sixty state accountability submissions that cover academic, fiscal, discipline, health, and safety issues. In Philadelphia, there are forty-seven accountability submissions required for charter schools, with an additional sixteen submissions for charter schools in the charter renewal process. There are also accountability requirements from the federal government and from local governments. Charter schools were created in part to be free from the bureaucratic mandates that handcuffed many public schools and districts. Rather than working to reduce those restrictions for districts, we have seen a steady increase in regulations in the charter community.

This has led some to view the increase as over-regulation of charter schools, a concept that has had disastrous effects on charter schools, specifically single site, and minority operated schools. A recent study from Johns Hopkins University and the University of Arkansas states that, "Empirical analyses indicate that independent and Black and Latino applicants are disproportionately and negatively impacted by increasing regulation." (Kingsbury et al., 2020) This national study did not include Pennsylvania schools, but the problem is a reality in our state.

In Philadelphia, 20% of charter schools are operated by minorities, yet 87% of schools recommended for closure or non-renewal are minority operated, with the vast majority being African American schools. There has not been a new minority operated charter school approved in Philadelphia in more than a decade. An independent study looking at the disparate treatment of black and minority operated charter schools has been commissioned by the School District of Philadelphia in response to allegations of bias made by the African American Charter School Coalition and by various data points presented that indicate a problem. Despite an ongoing investigation into this treatment, the Philadelphia School Board unexpectedly changed their process for renewal recommendations and recommended that two Black operated charter schools be non-renewed and closed. One of those schools is currently under a surrender clause, a stringent set of conditions that forces schools to forfeit appellate rights and surrender their charter if conditions are not met. The other school recommended for non-renewal is currently engaged in a non-renewal public hearing. Accountability is an assurance that an individual or organization is evaluated on its performance or behavior related to something for which it is responsible. The charter school law created charter schools to improve pupil learning, increase learning opportunities for pupils, encourage the use of different and innovative teaching methods, create new professional opportunities for teachers, and provide parents and pupils with expanded choice in public education. Accountability measures should ensure charter schools are meeting those standards and following established laws.

In the twenty-six years since the creation of the charter school law, a great deal has changed. Rather than pass reactive and pejorative laws and policies spurred by special interest groups, a true and balanced look at charter school funding and accountability should be undertaken. Such an examination should focus as much on authorizer accountability and efficacy as on charter schools. Studying concepts

such as a statewide intermediate unit for charter schools, independent authorizers, and authorizer accountability measures should be seriously considered moving forward. Finding ways for charter schools and traditional public schools to work collaboratively to enhance education and solve the social and educational problems facing our commonwealth must also be a priority. After more than a quarter of a century, we should be able to move past the district charter argument and engage in dialogue about innovating education for our children.

I thank you for the opportunity to speak before you this afternoon and am available for any questions you may have.

2022-23 Charter Schools Office Calendar of Collections								
Type of Work	Category	Item Type	Submission Requirement	Description	Upload Location	Schools	Priority Deadline	Final Deadline
Charter Agreement	Charter Agreement	Submission	Management Contract	All management agreements that the school has in place during the charter term.	Epicenter	All	N/A	3 Months before expiration OR upon start (for new agreements)
Charter Agreement	Charter Agreement	Submission	Lease Agreement	All lease agreements in place during the charter term.	Epicenter	All	N/A	3 Months before expiration OR upon start (for new locations)
School Operations	School Operations	Submission	Transportation Chargebacks	Confirm receipt of documents received from Special Finance detailing transportation chargeback and bus attendant cost information biannually, if applicable.	Epicenter Certification	Schools who utilize District Transportation	N/A	3x annually; TBD by The Department of Transportation Services and The Office of Financial Services
Framework	Board Governance	Submission	2021 Statements of Financial Interests	SOFIs for all Board Members and Administrators who served in the 2021 Calendar Year.	Epicenter	All	Fri, Apr 15, 2022	Sun, May 1, 2022
Framework	Board Governance	Submission	Current Year Approved Board Minutes - Quarter 3	Compilation of Approved Board Minutes for meetings that took place from 1/1/22-3/31/22	Epicenter	All	N/A	Sun, May 1, 2022
School Operations	School Operations	Submission	Transportation Calendar	Complete academic calendar in Excel to be used as the basis for transportation route scheduling for SY2022-23.	E-mail directly to Transportation Analyst	All	N/A	Fri, May 27, 2022
School Operations	School Operations	Submission	User Verification	Network personnel to review User Verification forms and assign systems user access for Infinite Campus (SIS), Compass, and Charter School Payments (CSP) for SY2022-23.	School Specific Google Sheet	All	N/A	Fri, Jun 10, 2022
Renewal Process	Renewal Process	Submission	Renewal Letter of Intent	The school is to submit the Letter of Intent to renew their charter to the CSO.	Epicenter	Renewal	N/A	Fri, Jun 10, 2022
Renewal Process	Renewal Process	Submission	Prep Documents for Renewal Document Review	In preparation for document review, schools are to submit a list of all SY2021-22 staff and English Learners.	Epicenter	Renewal	N/A	Wed, Jun 15, 2022
Framework	Personnel	Submission	ESL Certification	Roster of all ESL instructors and evidence of their certification who were employed during the school year that just concluded.	Epicenter	All* (Serving ELs)	N/A	Wed, Jun 29, 2022
Framework	Board Governance	<i>Review Reminder</i>	Board of Trustees Roster	Certify all Board Members listed in Epicenter are accurate. If inaccurate or incomplete, update Roster.	Epicenter Certification	All	N/A	Thu, Jun 30, 2022
Framework	Board Governance	Submission	Current Year - Proposed Board Calendar	A list of all proposed meetings of the Board of Trustees for the upcoming school year.	Epicenter	All	N/A	Thu, Jun 30, 2022
Framework	Board Governance	<i>Review Reminder</i>	Board Website	Confirm that board rosters, board meeting schedules, and board minutes are posted to the school's website in compliance with Charter Agreement	School Website	All	N/A	Fri, Jul 1, 2022
Renewal Process	Renewal Process	Submission	Renewal Application	Renewal application and all applicable documents.	Epicenter	Renewal	N/A	Fri, Jul 15, 2022
Framework	Special Education	Submission	Special Education Student Files (Renewal Document Review)	Files with student IEPs and progress monitoring evidence (IEP progress reports, special education teacher caseload notes, etc.) for requested student list.	Epicenter	Renewal (Schools w/out BSE cyclical monitoring during charter term)	N/A	Thurs, Jul 14, 2022
Framework	Special Education	Submission	School-Wide Screening Evidence (Renewal Document Review)	Evidence school-wide assessment data used during the 2021-22 school year to determine levels of student achievement and students flagged for intervention and support.	Epicenter	Renewal	N/A	Thurs, Jul 14, 2022
Framework	Special Education	Submission	School-Wide Tiered Instruction Evidence (Renewal Document Review)	Evidence of implemented research-based interventions during the 2021-22 school year included in either a school-wide tracker or RTI/MTSS meeting notes.	Epicenter	Renewal	N/A	Thurs, Jul 14, 2022
Framework	Special Education	Submission	School-Wide Progress Monitoring Evidence (Renewal Document Review)	Evidence of school-wide progress monitoring during the 2021-22 school year to provide information on students' learning rate and level of achievement.	Epicenter	Renewal	N/A	Thurs, Jul 14, 2022
Framework	Financial Health & Fiscal Management	Submission	Approved Budget	Board approved budget for the upcoming fiscal year. Submission should include budget detail as submitted to PDE as well as documentation of board approval.	Epicenter	All	N/A	Fri, Jul 15, 2022

2022-23 Charter Schools Office Calendar of Collections

Framework	Timely Reporting	Submission	PDE Annual Report	Report required annually by the state.	PDE Portal	All	N/A	Mon, Aug 1, 2022
Framework	Board Governance	Submission	Current Year Approved Board Minutes - Quarter 4	Compilation of Approved Board Minutes for meetings that took place from 4/1/22-6/30/22	Epicenter	All	N/A	Mon, Aug 1, 2022
Framework	Enrollment	Submission	Lottery Results (Renewal Document Review)	Copy of results from lottery conducted during the 2021-22 school year for enrollment in 2022-23 . The results should illustrate who, by grade, was initially accepted versus placed on the waiting list. <i>If your school used Apply Philly Charter, please submit the "2022-23 (Extended) All Applicant" report from the APC system to provide evidence of lottery results.</i>	Epicenter	Renewal	N/A	Wed, Aug 10, 2022
Framework	Enrollment	Submission	Student Enrollment Files (Renewal Document Review)	Enrollment files for the sample student list provided that illustrates all paperwork submitted by the student and/or family upon acceptance to confirm enrollment.	Epicenter	Renewal	N/A	Wed, Aug 10, 2022
Framework	Enrollment	Submission	Waiting List (Renewal Document Review)	If school is at or above maximized authorized enrollment, provide a current waiting list for all grades in the school as of the date of submission request. <i>If your school used Apply Philly Charter, please submit the "22-23 Students that are Waitlist" report from the APC system to provide evidence of waiting lists.</i>	Epicenter	Renewal	N/A	Wed, Aug 10, 2022
Framework	Food, Health, and Safety	Submission	Student Health Schedule (Renewal Document Review)	Evidence of the timeline for when required exams and screenings will be scheduled for students during the 2022-23 school year.	Epicenter	Renewal	N/A	Wed, Sep 21, 2022
Framework	Food, Health, and Safety	Submission	Student Health Records (Renewal Document Review)	Evidence of required medical and dental exams, vision and hearing screenings, height and weight measurements, tuberculosis tests, and scoliosis screenings.	Epicenter	Renewal	N/A	Wed, Sep 21, 2022
School Operations	School Operations	Submission	School Profile	Review and verify key school personnel information and Academic Highlights. Confirmation of data is critical to ensure accurate public reporting (such as ACE reports and CSO website).	School Specific Google Sheet	All	N/A	Mon, Aug 22, 2022
School Overview	Demographics	Submission	PEARS Report	Schools' PEARS Site Eligibility Reports.	Epicenter	All	N/A	Wed, Aug 24, 2022
Framework	Discipline	Submission	Code of Conduct	Code of Conduct that will be distributed to families in the upcoming school year. This can either be a standalone document or submitted as a part of the Family/Student Handbook.	Epicenter	All	Thu, Jun 30, 2022	Wed, Aug 24, 2022
Framework	Discipline	Submission	Expulsion Documentation	Expulsion records and list of all students recommended for expulsion or expelled, the reason(s), the date of school action, and whether each student withdrew prior to expulsion. Full expulsion records should be provided for any student recommended for or expelled throughout the charter term – records should include hearing notification and due process rights sent to family, evidence of hearing or withdrawal before hearing, manifestation determination meeting notes if the student had an IEP and affirmation of expulsion within board minutes.	Epicenter	All	Thu, Jun 30, 2022	Wed, Aug 24, 2022
Framework	Discipline	Submission	Truancy Policy and Program Description	Most up to date Truancy Policy, including a description of the program.	Epicenter	All	Thu, Jun 30, 2022	Wed, Aug 24, 2022
Framework	Food, Health, and Safety	Submission	Food Service Contracts	All food service contracts that were used during the charter term.	Epicenter	Renewal	N/A	Wed, Aug 24, 2022
Framework	Food, Health, and Safety	Submission	PDE Food Service Review	All food service reviews performed by the Pennsylvania Department of Education during the charter term.	Epicenter	Renewal	N/A	Wed, Aug 24, 2022
Charter Agreement	Charter Agreement	Submission	Certificate of Insurance	Certificates of Insurance evidencing all required insurance coverages identified in your charter agreement for the current school year.	Epicenter	All	N/A	Wed, Aug 24, 2022
Framework	Academic Success	Submission	SPR Phase I Data Packet	Key information regarding students that is not collected via Infinite Campus. This information allows the calculation of outcomes in the SPR and the CSO Academic Success Domain.	Epicenter	All	N/A	Fri, Sep 9, 2022

2022-23 Charter Schools Office Calendar of Collections

Framework	Enrollment	Submission	Enrollment Policy	Written lottery and enrollment policies and procedures that will be used by the school to enroll students during SY2022-23.	Epicenter	All	Thu, Jun 30, 2022	Wed, Aug 24, 2022
Framework	Enrollment	Submission	Student Application	Application, including instructions, used to enroll students during SY2022-23. <i>Note: If your school participates in Apply Philly Charter, please submit your MOU.</i>	Epicenter	All	Thu, Jun 30, 2022	Wed, Aug 24, 2022
Framework	Enrollment	Submission	Enrollment Materials	Enrollment packet used by schools during SY 2022-23 that will be released to students who are or will be selected in the lottery process for SY2023-24. The packet should include all information given to families seeking to enroll before their enrollment is confirmed.	Epicenter	All	Thu, Jun 30, 2022	Wed, Aug 24, 2022
Framework	Food, Health, and Safety	<i>Review Reminder</i>	Water Quality Test Results Certification	School provides results and relevant documentation of most recent water testing on its website	School Website	All	Wed, Jun 29, 2022	Wed, Aug 24, 2022
Framework	Food, Health, and Safety	Submission	Student Health Services Policy	Most up to date Student Health Services Policy to be used for the 2022-23 school year.	Epicenter	All	Wed, Jun 29, 2022	Wed, Aug 24, 2022
Framework	Food, Health, and Safety	Submission	School Health Annual Reimbursement Request System (SHARRS) Reports and Vouchers	Evidence of School Nurse (direct or contracted employee) being appropriately certified.	Epicenter	Renewal	N/A	Wed, Aug 24, 2022
Framework	English Learners	Submission	Language Instruction Educational Program Policy	Documentation detailing the school's Language Instruction Educational Program (LIEP) policy.	Epicenter	All	Wed, Jun 29, 2022	Wed, Aug 24, 2022
Framework	English Learners	Submission	EL Placement Notification Letter	Example of school's letter template for notifying parents/guardians of EL identification/program placement.	Epicenter	All	Wed, Jun 29, 2022	Wed, Aug 24, 2022
Framework	Special Education	<i>Review Reminder</i>	Child Find Notice	The school's website has a child find policy detailing that the school supports all students with disabilities and includes language regarding systemic screening activities. It informs parents of available SPED services and programs and how to request those services and programs.	School Website	All	Wed, Jun 29, 2022	Wed, Aug 24, 2022
Framework	Board Governance	<i>Review Reminder</i>	Board Accessibility	Information located on the School's website explaining how members of the public can participate at board meetings.	School Website	All	Thu, Jun 30, 2022	Fri, Aug 26, 2022
Framework	Board Governance	Submission	List of Newly Appointed Board Members in 2020-21 and their Board Training Certificates	School board directors and charter school trustees are required to complete training programs pursuant to Act 55 of 2017. Board members newly appointed between July 1, 2020 and June 30, 2021 must be trained by June 30, 2022.	Epicenter	All	Fri, Jul 15, 2022	Mon, Sep 12, 2022
Framework	English Learners	Submission	English Learner Student Files (Renewal Document Review)	EL files should be provided for a sample of EL students served during the charter term.	Epicenter	Renewal	N/A	Wed, Sep 21, 2022
Framework	Personnel	Submission	Checks and Clearances (Renewal Document Review)	For the sample employee list, copies of historical and active clearances throughout the duration of a staff member's employment with the school (PA criminal background checks, PA Child abuse clearances, FBI background checks and Act 168 documentation (as applicable)).	Epicenter	Renewal	N/A	Wed, Sep 21, 2022
Framework	Discipline	<i>Review Reminder</i>	Code Website	Confirm that a current copy of the school's Code of Conduct and Truancy Policy are posted to the school's website	School Website	All	Wed, Aug 24, 2022	Tue, Sep 27, 2022
Framework	Board Governance	<i>Review Reminder</i>	Board of Trustees Roster	Certify all Board Members listed in Epicenter are accurate. If inaccurate or incomplete, update Roster.	Epicenter Certification	All	N/A	Sat, Oct 1, 2022
Framework	Academic Success	Submission	SPR Phase II Data Packet	Additional information on students at the school based on October 1 data	Epicenter	All	N/A	Fri, Oct 21, 2022
Framework	Board Governance	<i>Review Reminder</i>	Board Website	Confirm that board rosters, board meeting schedules, and board minutes are posted to the school's website in compliance with Charter Agreement	School Website	All	N/A	Sat, Oct 8, 2022
Framework	Board Governance	Submission	Current Year Approved Board Minutes - Quarter 1	Compilation of Approved Board Minutes for meetings that took place from 7/1/22-9/30/22	Epicenter	All	N/A	Tue, Nov 1, 2022
Framework	Board Governance	Submission	Board Bylaws	The Board Bylaws that were in effect during the 2021-22 school year. If the Bylaws were updated between July 1, 2021 and June 30, 2022, please provide all versions of the Bylaws that were in use in 2021-22, along with documentation of Board approval of all updates (resolution or Board approved minutes.	Epicenter	Renewal	N/A	Tue, Nov 1, 2022
Framework	Board Governance	<i>Review Reminder</i>	Board Contact Information	School Website lists email addresses for every individual serving on the Board of Trustees	Epicenter	All	N/A	Mon, Nov 7, 2022

2022-23 Charter Schools Office Calendar of Collections

School Operations	School Operations	Submission	Enrollment Projections	Confirm student enrollment projections for the subsequent five years.	School Specific Google Sheet	All	N/A	Fri, Dec 30, 2022
Framework	Financial Health	Submission	FY22 Audited Financial Statements	Finalized annual audited financial statements for the school and, if applicable, for the component unit(s) associated with the school.	Epicenter	All	N/A	Sat, Dec 31, 2022
Framework	Board Governance	<i>Review Reminder</i>	Board Website	Confirm that board rosters, board meeting schedules, and board minutes are posted to the school's website in compliance with Charter Agreement	School Website	All	N/A	Sat, Jan 7, 2023
Framework	Board Governance	<i>Review Reminder</i>	Board of Trustees Roster	Certify all Board Members listed in Epicenter are accurate. If inaccurate or incomplete, update Roster.	Epicenter Certification	All	N/A	Sat, Jan 14, 2023
Process	Amendments	Submission	Mid-Term Material Charter Amendment Request Deadline	Mid-term material charter amendment requests must be submitted with required documents by January 15 of the school year prior to the proposed charter amendment effective date (except in the situations involving unforeseen emergencies).	Email	Schools Interested in Mid-Term Material Charter Amendments	N/A	Sun, Jan 15, 2023
Surveys	N/A	Submission	Teacher Emails	Submit a list of teacher names and emails to ensure they receive the School District surveys	Epicenter	All	N/A	Fri, Jan 27, 2023
Framework	Board Governance	Submission	Current Year Approved Board Minutes - Quarter 2	Compilation of Approved Board Minutes for meetings that took place from 10/1/22-12/31/22	Epicenter	All	N/A	Wed, Feb 1, 2023
Framework	Board Governance	<i>Review Reminder</i>	Board Website	Confirm that board rosters, board meeting schedules, and board minutes are posted to the school's website in compliance with Charter Agreement	School Website	All	N/A	Sat, Apr 1, 2023
School Operations	School Operations	Submission	Extended School Year (ESY) Transportation Calendars	Complete Extended School Year calendar to be used as the basis for transportation route scheduling for Summer 2023 ESY.	Google Form	All	N/A	Fri, Apr 7, 2023
School Operations	School Operations	Submission	School Calendar Shell	Confirm calendar schedule for SY2023-24 via completion of the Calendar Submission Survey.	Google Form	All	N/A	Fri, Apr 28, 2023
Framework	Board Governance	Submission	2022 Statements of Financial Interest	SOFIs for all Board Members and Administrators who served in the 2022 Calendar Year	Epicenter	All	Fri, Mar 24, 2023	Mon, May 1, 2023
Framework	Board Governance	Submission	Current Year Approved Board Minutes - Quarter 3	Compilation of Approved Board Minutes for meetings that took place from 1/1/23-3/31/23	Epicenter	All	N/A	Mon, May 1, 2023
Framework	Board Governance	Submission	Approved Board Minutes - Quarter 4	Compilation of Approved Board Minutes for meetings that took place from 4/1/23-6/30/23	Epicenter	All	N/A	Fri, Sept 15, 2023


Accountability & Pennsylvania's Public Charter Schools

Pennsylvania's Public Charter Schools are held to a higher level of accountability than all other Public Schools. As Local Education Agencies, they are held to the same state and federal mandates as all other public schools. In addition, Pennsylvania's Public Charter Schools are accountable to:

- The Pennsylvania Department of Education (PDE) which authorizes Cyber Charter Schools.
- Their respective Charter Authorizer, either PDE or their local School District(s).
- The individual parents and families who choose Public Charter Schools to help their children achieve their goals.

Pennsylvania's Public Charter Schools List of Annual Reports

CHARTER RENEWAL			
Type of Report	Description	Recipient	Frequency
Charter Renewal Application	Renewal application for continued operation and service to students and families.	Authorizers	Every 3-5 years
FINANCIAL			
Type of Report	Description	Recipient	Frequency
Independent Audit Report	Report by Independent Auditing Firm affirming the fair presentation of all financial statements.	Board of Trustees, Public, Authorizer	Annually
990 Return of Organization Exempt from Income Tax	990 Return Report of operational expenses. Explaining how and where our money has been spent.	Department of Treasury IRS, Public	Annually
Annual Financial Report (AFR)	Report details Profit & Loss Income Statement and Balance Sheet for the school.	PDE	Annually
Form W3 Transmittal of Wage and Tax Statements	A summary of totals we paid and taxes withheld within our organization.	Department of Treasury; Internal Revenue Service	Annually
General Fund Budget	Report details the budget for the school.	PDE, Authorizer(s), Public	Annually
Notice of Adoption of Policies, Procedures and Use of Funds by Charter School	Required forms to obtain IDEA Part B funding. Comes from/sent to respective Intermediate Unit from the respective Chief Financial Officer or Business Manager.	Respective Intermediate Unit	Annually
STATE-MANDATED TESTING			
Type of Report	Description	Recipient	Frequency
District Verification Report	Provides the LEA an opportunity to review the number of students at the district-level matched to Test Records that will be included in specific subgroups for accountability reporting (e.g., ethnicity, English Learner status, economically disadvantaged, Title IA, etc.).	PDE	Annually
Test Administrator Schedules and Certifications	Reports test administrators testing locations and certifications.	PDE	3 times per year
PSSA Update - Accountability: PSSA Accountability Reporting	Verification of students and student demographics of students who tested with the school.	PDE	Annually

HEALTH			
Type of Report	Description	Recipient	Frequency
School Health Annual Reimbursement Request System (SHARRS)	Pupil health budget, record of illnesses/injuries, exam dates, immunization reports, nursing staff salary & certifications.	PA Department of Health	Annually
School Health Personnel Immunization and Disease Reporting (SILR)	Record of Immunization Compliancy.	PA Department of Health	Annually
			

Accountability & Pennsylvania's Public Charter Schools

Pennsylvania's Public Charter Schools List of Annual Reports

SCHOOL-WIDE			
Type of Report	Description	Recipient	Frequency
ACT 44 of 2018 Annual Report	This report is an informal report of any items related to ACT 44 of 2018 (School Safety and Security) that have occurred or changed throughout the school year.	Pennsylvania Commission on Crime and Delinquency	Annually
Annual Family Education Rights and Privacy Act (FERPA) Notice	This notification is provided to families informing them of their rights as they relate to the student's academic records and how we protect the student's academic records.	Public	Annually
Charter School Annual Report	Board meeting dates, number of staff by category, audit information, Federal Program report, Special Education report, Special Education Professional Development, Special Education Program Profile, Fixed Assets, Capital Needs.	PDE, Authorizer(s)	Annually
Civil Rights Data Collection	This report collects a variety of information including student enrollment and educational programs and services, most of which is disaggregated by race/ethnicity, sex, limited English proficiency, and disability.	Federal Office of Civil Rights	Bi-Annually
Comprehensive Plan	Comprehensive strategic plan to increase student performance and achievement.	PDE, Public	3-Year Cycle
Limited English Proficiency (LEP) Program Survey	To ensure compliance with Chapter 4.26- reporting Chapter 4.26 assurances, assessments, language(s) for Bilingual program models, teacher counts, budget information.	PDE	Annually
Non-Career Technical Education (CTE) Work-Based Learning Experiences (WBLE)	Current Year; Student-Non-CTE Work based Learning Experiences.	PDE	Annually
Statement of Financial Interest	In order to comply with the annual financial disclosure requirements of the Public Official and Employee Ethics Act, we are required to have Board Members and employees complete the Statement of Financial Interest Form each year the position is held and the year after leaving the position.	Kept internally; not submitted	Annually
FACULTY			
Type of Report	Description	Recipient	Frequency
Professional Educational Plan (Professional Development)	Part of the Comprehensive Plan, complete report of how the LEA meets guidelines for the PDE; approved Professional Development Plan aligned with Comprehensive and School-wide Plans to improve student achievement.	PDE	Every 3 years
Teacher and Principal Evaluation Survey	Report of aggregate data on instructional staff evaluation practices.	PDE	Annually

Accountability & Pennsylvania's Public Charter Schools

PSERS Reporting	Report on all staff earnings and employer contributions.	Public School Employees Retirement System	Monthly, Quarterly, Annually
403B Reporting	Report on all staff earnings and employer contributions.	403B Vendor	Monthly, Quarterly, Annually

GUIDANCE

Type of Report	Description	Recipient	Frequency
Alternative Education for Disruptive Youth (AEDY)	Completed when the LEA applied for a general education student to be placed.	PDE	Annually
Safe Schools - Student Assistance Program Report	Demographic information for all students discussed during a Student Assistance Program (SAP) meeting.	PDE	Annually
Transportation Plan for Foster Care Youth	Report of transportation for foster care youth.	PDE	Annually

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Pennsylvania's Public Charter Schools List of Annual Reports

SPECIAL EDUCATION			
Type of Report	Description	Recipient	Frequency
Annual Special Education (SPED) Notice	The purpose of this Annual Notice is to comply with the Charter School's obligations under Chapter 711 of Title 22 of the Pennsylvania Code and to describe: (1) the types of disabilities that might qualify the child for special education; (2) the special education programs and related services that are available; (3) the process by which the Charter School screens and evaluates such students to determine eligibility; (4) the special rights that pertain to such children and their parents or legal guardians; and (5) the confidentiality rights that pertain to student information.	Public	Annually
Child Find Notice	Child Find Notice is legal requirement that schools find all child who have disabilities and who may be entitled to special education services. Child Find covers all children from birth to 21.	Public	Annually
Comparison Reports Table 1-3 & 13	Report run in PASDM that compares Tables 1-3 & 13 for current year against previous year. Requires explanation for significant changes in percent of student population to be submitted to the Intermediate Unit.	IU/Penn Data, PA State Data Manager (PASDM)	Annually
Deaf-Blind Census	Reporting all students with the eligibility of both Deafness and Blindness.	PDE	Annually
Federal Quota Registration of Blind Students	Annual registration of students who are eligible to receive materials provided by the Federal Act to Promote the Education of the Blind.	PaTTAN	Annually
PASA Registration	Verify 1% PASA Eligible students.	PDE	Annually
PASA Mandated Participation Waiver Application	Under the new Every Student Succeeds Act (ESSA) requirements, a LEA must complete and submit a PASA Mandated Participation Waiver Application if it anticipates exceeding the one percent participation cap during the school year.	Bureau of Special Education	Annually

Accountability & Pennsylvania's Public Charter Schools

Penn Data Table 8A	Tracks Special Education Initial Evaluations to ensure compliance with the 60 day timeline requirement.	Intermediate Unit	Cyclical - every 6 years
Penn Data Table 9a	Amount of disciplinary removals (suspensions, expulsion, unilateral removals) during school year; Special Education Students Only.	IU/Penn Data	Annually
Special Education 12/1 Count	Reporting all special education students with a valid Individualized Education Plan (IEP) as of 12/1 of the current school year.	PDE	Annually
Special Education Act 16 -- Services cost per student	For the previous school year, this report identifies the educational expenditure cost range for each student with disabilities. The expenditure range is based on the total cost of the student's special education program directed by an IEP for the entire school year.	PDE	Annually
Special Education End of Year	Reporting all students who exited special education during the current school year. New for 2016-2017; also, reporting all students in transitional IEP services ages 14 and up.	PDE	Annually
Special Education Restraints (RISC)	Reporting number of incidents of Special Education student restraints being utilized.	Pennsylvania Bureau of Special Education	Quarterly
Special Education Transitions/Exits; Collection	Special Education Transitions/Exits from School to Work. Based upon student's IEP.	PDE	Annually

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Pennsylvania's Public Charter Schools List of Annual Reports

FEDERAL PROGRAMS			
Type of Report	Description	Recipient	Frequency
Federal Program Monitoring	Review and audit of title expenditures, LEA management of Title grant, and accountability for federal funds.	PDE	Every 3-4 years
Right to Know Letter	School's receiving Title I funding are required to inform parents of their right to know the qualifications of the teachers and paraprofessionals who instruct their students. This letter outlines this right and is to be posted on the school website in both English and Spanish.	Public	Annually
Title I Certification of Single-Funded Federal Employees or PDE 414	Documentation via time and effort logs for staff fully funded by federal funds	PDE	Semi-Annually
Title I Comparability Report	Exemption to report that shows how LEA provides state and local resources in Title I schools that are comparable to the services provided in non-Title I schools.	PDE	Annually
Title I Final Expenditure Report (for previous grant year)	Final report of use of Title I funds.	PDE	Annually
Title I Monthly Activity Report for Split-time Employees	Documentation of staff partially funded using federal funds.	PDE	Monthly
Title I School-wide Plan	Detailed action plan to increase student achievement; this is part of the Comprehensive Plan.	PDE	Annually
Uniform Grants Guidance Performance Goal Output Report	Accountability report of progress toward performance goals outlined in school wide plan.	PDE	Annually
PDE ESSER Compliance Monitoring	Review and audit of ESSER expenditures, LEA management of ESSER grant, and accountability for federal funds.	PDE	When Selected

Accountability & Pennsylvania's Public Charter Schools

PENNSYLVANIA INFORMATION MANAGEMENT SYSTEM (PIMS)

Type of Report	Description	Recipient	Frequency
ACCESS for English Language Learners Accountability	Local Education Agency (LEA) must update data on Limited English Proficiency (LEP) and Title III LEP students enrolled during the ACCESS 2.0/Alternate ACCESS for English Language Learners testing window. The director of EL (English Language) reports students who enrolled for the ACCESS test for EL students; any updates/changes reported to PIMS ongoing through due date.	PDE	Annually
ACCESS and Alternate ACCESS Precode	LEAs update demographic data for Limited English Proficiency (LEP) students, to provide data to Data Recognition Corps. (DRC) to produce precode labels and populate WIDA Assessment Management System (AMS) for ACCESS 2.0/Alternate ACCESS for ELLs assessments.	PDE	Annually
Career Standards Benchmarks	Student-Career Standards Benchmarks	PDE	Annually
Collections 1 Programs Fact Template	This template is used to track participation for specific state and federal programs. The template is required only for schools with any of the tracked programs.	PDE	Annually
Collections 1 Staff Professional and Support	Accountability report that delineates instructional staff and assignments (instructional areas, additional responsibilities). Cumulative record of all staff (terminated and non-terminated).	PDE	Annually
Collections 1 Title I Student Template	LEA will submit the students educated by the LEA for one or more classes on the first business day in October, providing data; indicating the economically disadvantaged status of a student, providing the official low-income count for Teach Loan Forgiveness program; collect data for LEP students enrolled; Special Education students; Title III served students enrolled; students meeting the Title III definition of immigrant.	PDE	Annually

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Pennsylvania's Public Charter Schools List of Annual Reports

PENNSYLVANIA INFORMATION MANAGEMENT SYSTEM (PIMS) - Continued

Type of Report	Description	Recipient	Frequency
Collections 1 October Student	Mandated by the federal government to be collected on an annual basis, this data is used at the federal level to analyze program participation and to guide policy and programmatic decisions at the national, state and local level. The aggregate LEA data reported is from the prior school year and includes participation in instructional and support services for Targeted programs, participation counts by Targeted and School Wide program, ethnicity, grade, special needs and staffing data by program type.	PDE	Annually
Child Accounting End-of-Year	Collects attendance and membership data for each student throughout the school year. The membership data is used in the calculation of state subsidies and used in the calculation of each school district's tuition rate.	PDE	Annually

Child Accounting (kindergarten starting age)	Provides the last date on which a student may meet the minimum required age for entry into the earliest kindergarten program.	PDE	Annually
Course/Instructor Report	Report administrators can view the results of individual courses per instructor. The instructor course reports supply evaluation results for each course an instructor is assigned to, separately--this is unlike the summary report, which displays a summary of all of the data associated with that instructor. Course reports provide results in a quantitative, qualitative, and segment comparison report view.	PDE	Annually
Course/Instructor Report	Report administrators can view the results of individual courses per instructor. The instructor course reports supply evaluation results for each course an instructor is assigned to, separately--this is unlike the summary report, which displays a summary of all of the data associated with that instructor. Course reports provide results in a quantitative, qualitative, and segment comparison report view.	PDE	Annually
ELL/Immigrant End of Year Counts	Snapshot: Student and School Enrollment Template updates throughout the year. Must be updated by 12:00pm on August 15 to be included in the Internal Snapshot.	PDE	Annually
Grade 11 Keystone Accountability	Snapshot: Student, School Enrollment, Programs Fact must be updated by 12:00 noon on May 30 to be included in the Internal Snapshot, must reflect accurate May 24, 2019 data in Student, School Enrollment and Programs Fact.	PDE	Annually
Graduation/Drop Cohort by School Year	Report explains how many students graduated, and didn't from the previous school year.	PDE	Annually
Homeless Student Report	Updates for students who are currently homeless and need extra support.	PDE	Monthly
Interscholastic Athletic Opportunities	Interscholastic Athletic Opportunities.	PDE	Annually
Language Instruction Educational Program (LIEP) Survey	Planned English language development instruction by a qualified ESL/Bilingual Education teacher, and adaptations/modifications in the delivery of content instruction and assessments by all teachers based on students' language proficiency levels and the Pennsylvania English Language Development Standards (PA ELDS) Framework for ELs as well as the Pennsylvania academic standards.	PDE	Annually

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Accountability & Pennsylvania's Public Charter Schools

Pennsylvania's Public Charter Schools List of Annual Reports

PENNSYLVANIA INFORMATION MANAGEMENT SYSTEM (PIMS) - Continued			
Type of Report	Description	Recipient	Frequency
PATI - Pennsylvania Technology Inventory - LEA Collection	Annual data collection for technology-related data, gathered through a variety of surveys. Used for required federal and state technology reporting, as well as providing data to the LEA to be used to plan for the strategic use of local technology resources.	PDE	Annually
Precode for Winter Keystone - Updates	Snapshot: Report of student demographics for eligible students to test.	PDE	Annually
PSSA Precodes	Snapshot: Report of student demographics for eligible students to test.	PDE	Annually
PSSA Accountability Reporting for English Language Arts	Snapshot: Verification of students and student demographics who tested with the school.	PDE	Annually

PSSA Accountability Reporting for Mathematics	Verification of students and student demographics who tested with the school.	PDE	Annually
PSSA Accountability Reporting for Science	Verification of students and student demographics who tested with the school.	PDE	Annually
Pennsylvania Value Added Assessment System (PVAAS) Student Roster Verification Gap	Roster Verification	PDE	Annually
PVAAS (Pennsylvania Value Added Assessment System) Student/Staff	Data pull of staff and students. Staff and Student and School Enrollment templates Needs to be updated for the internal snapshot to create student and staff accounts.	PDE	Annually
PVAAS (Pennsylvania Value Added Assessment System) – Staff/Student Subtest (PVAAS)	Accounts for teacher instructional responsibility and relationship weights in preparing students for Keystone and PSSAs. This report provides data for SPP and PVAAS reporting.	PDE	Annually
Safe Schools Report	Reporting LEA Habitual truants in aggregate data, Bullying Prevention statement, and reporting all school safety and security incidents.	PDE	Annually
Safe Schools - Bus Evacuation	Bus Evacuation Drill.	PDE	Annually
Safe Schools - Fire & Security Drills	Fire & Security Drill.	PDE	Annually
School Enrollment Template	This is part of the October 1 Collection (staff and student).	PDE	Annually
School Performance Profile	Snapshot: Updates to templates.	PDE	Annually
Spring Keystone Precodes - Updates	Snapshot: Report of student demographics for eligible students to test.	PDE	Annually
Spring Keystone Reporting	Internal Snapshot: Reporting students that take the Spring Keystone assessment test.	PDE	Annually
Student - Local Assessment - Updates	Student Local assessment.	PDE	Annually
Student - Industry Recognized Credentials and Work-Based Learning	A template/collection indicating what students have participated in earning industry recognized credentials.	PDE	Annually
Winter Keystone Reporting - Updates	Snapshot of submitted data.	PDE	Annually



House Republican Policy Committee
Testimony – January 30, 2023
From Beth Jones, M.Ed., M.B.A., SPHR
Chief Operating Officer/Interim CFO
Board President of PA Coalition of Public Charter Schools (PCPCS)

Good afternoon. I'm Beth Jones, the COO/Interim CFO of Insight PA Cyber Charter School and the President of the Board for the PA Coalition of Public Charter Schools. Thank you for the opportunity to share information with you about charter schools and my school specifically.

A bit of background about me – my career in education started over 30 years ago as a Kindergarten teacher in a traditional public school district. Since then I've taught all ages – from toddlers to adults, including time as an adjunct instructor at a PA community college. I've been involved in the PA charter school movement since 1998. I'm a Founder of Collegium Charter School in Exton, PA and served as its COO until 2017. We opened with 39 students on day 1 and had close to 3000 students when I left. Beginning in 2018, I started work as the CFO at Insight PA Cyber Charter School – this was during its 1st year of operations. I'm now it's COO – and we've experienced unimaginable growth since we opened - from hundreds of students our first year to over 4000 students today.

Whenever I speak to folks about charters, I always include a few basic facts...forgive me if you are already aware.

- Charter schools are public schools.
- Charter schools are non-profit entities – they are not for profit.
- Charter schools do not charge tuition fees.
- Charter schools operate on less funding per student than traditional districts.
- Charter schools have enrollment...not admissions. Unlike a private school, we cannot select the students who enroll in our school.
- Cyber charter schools do offer full educational programming along with plenty of opportunities to engage socially to build connections and friendships.
- Charter schools typically serve more students from economically disadvantaged families, tend to have greater diversity amongst their students, and typically enroll more students with special education needs than the traditional school districts.
- Charter schools are held accountable – by the parents who chose our schools and can chose to walk away if not satisfied, by our authorizer who grants our charter and monitors our performance, and by the Department of Education through a myriad of required reports and compliance monitoring programs.

Now that I've covered the basics...let me share a bit about Insight PA Cyber Charter School.

Insight PA first submitted our charter application in 2014, after years of work by the founding board. Our application was denied by the PDE in 2015 and the appeals process began. That process took over two years before the Commonwealth Court of PA ruled that the Charter Appeals Board must direct the PDE to issue Insight PA a charter. Our origin story and the related delays, costs, and frustrations are not uncommon in PA when trying to start a charter school. Unfortunately, the process of "authorizing" or granting a charter to allow a charter school to open rests with the public-school districts in which the proposed charter is located or in the case of a cyber charter, by the PDE. Think about it this way...this authorizing process for brick and mortar schools is akin to allowing the McDonald's of the world to permit or deny the openings of the Chick-fil-As. And, for us cyber schools, the political winds in Harrisburg often determine how receptive or combative the folks at PDE are. Public education should not be a monopoly, nor should it be subject to the pendulum swings of politics.

Insight PA's differentiating factor is our career pathways programming. While many schools are talking about career readiness and alternatives to traditional 4-year college *now*, this was not the norm when Insight PA was established.



Families were hungry for an alternative that would allow their children to learn online and prepare for the post-secondary career or education that was most meaningful to them. While career readiness education begins in our elementary grades, it is in our high school program where students can select a career pathway in business, health science, or information technology – with an education pathway in development to launch in the 23-24 school year. In addition to the courses available in these pathways, we also have a number of partnerships with organizations across PA that provide pre-apprenticeship opportunities for our high school students. These opportunities vary – some provide virtual courses, others a hybrid of virtual and in-person programming, many include in-person, hands-on experiences, and successful completion of some programs can lead to nationally recognized career credentials.

I'd like to tell you about one of our high school students – we'll call him Nathaniel. Nathaniel is a senior who has special education needs. He expressed interest in a construction career. His school counselor worked with him and his family and this led to Nathaniel being accepted into the Keystone Chapter of the Association of Builders and Contractors Pre-Apprenticeship program. Along with his academic courses, Nathaniel works through virtual career-related courses each day and one day a week participates in hands-on Safety 360 training. He learns about all trade areas – electrical, HVAC, carpentry, sheet metal, heavy equipment operations, and plumbing. When he completes the program at the end of this school year and passes the associated exams, he will earn his pre-apprenticeship certificate, his OSHA-10 certificate, and his National Center for Construction Education and Research card. This card is recognized across the country and will align to an apprenticeship in any of the trades I previously mentioned. This student will be career-ready at graduation!

In addition to partnerships for pre-apprenticeships, Insight PA also partners with the Bender Leadership Academy, a western-PA based non-profit with a mission to increase long-term competitive employment for youth with disabilities. We are the only cyber charter in the state to participate in this program. Some of our high school students with special educational needs are participating in Bender's Leadership Academy. This program provides the students with a mentor to help the student transition to the workplace and provides a comprehensive approach to addressing the barriers to employment some students with special needs face. One of our high school participants, we'll call her Charlotte, was recently invited to give a speech to the Bender Board of Directors. This public speaking experience provides Charlotte with an opportunity to share information with the program leaders about her experiences and increase her confidence related to addressing adults and groups. The Bender program provides a positive social media environment for its students allowing them to connect to program alumni and leaders in the disability and business communities. The program assists students in developing career goals that align with competitive career opportunities, develop a network of peers and mentors, as well as help the students develop pride in being a member of the disability community. Each of the participating students earns a \$1,000 scholarship upon successful completion of the program – the scholarship can be used to help achieve their career or educational goals. Our students who complete this program will be prepared to access additional education or enter a career after their high school graduation!

I share these anecdotes to illustrate the comprehensive nature of our school's programming. We are well beyond the three R's of reading, (w)riting, and (a)rithmetic, and I'd be remiss if I didn't mention the obvious...there are costs associated with offering the extensive programming we and all the charters and cyber charters across the Commonwealth provide. So...when the conversation turns to proposed cuts to charter school funding, which it always seems to do come budget time, please keep Charlotte and Nathaniel and the over 170,000 students in PA charter schools in mind. Without sufficient funding levels, we couldn't do what we do to educate and prepare our students.

Thank you for your attentiveness and I welcome your questions.

**TESTIMONY BEFORE THE PENNSYLVANIA HOUSE OF REPRESENTATIVES
POLICY COMMITTEE
Monday, January 30, 2023**

**BRIAN HAYDEN
Chief Executive Officer
The Pennsylvania Cyber Charter School**

Chairman Kail and Members of the Policy Committee, my name is Brian Hayden, and I am the CEO of The Pennsylvania Cyber Charter School. On behalf of our 11,000 students and their families, thank you for holding this hearing on education financing.

At PA Cyber, we say the learning never stops. In our twenty-second year of online teaching and learning, we are one of the oldest and most experienced cyber charter schools in Pennsylvania and the United States. We are proud of the work we do to ensure that every student has the best opportunity to succeed in the classroom, the community, and workforce. Unfortunately, there are those who want to convince you otherwise: that we are greedy, uncaring, and provide a poor education that does not prepare students for the future. I am here to tell you there is no truth to that.

At PA Cyber, we are committed to engaging with every person and organization that has an impact on public schools. We have consistently sought out ways to work with the Governor, General Assembly, PDE, unions and organizations representing traditional public schools on ways to improve all sectors of public education, including cyber charter schools. During these engagements, we have proposed reforms and we have endorsed some reform proposals that have been suggested by others. All with the intent of continually seeking solutions to improve the manner in which we fund the education of students around the Commonwealth. However,

these discussions need to be based on fact not perception, be fair and transparent, and most importantly should never treat our students and their parents as second-class citizens..

Any effort to find common ground on reform must be rooted in a shared set of facts, and in the past, there was a significant disconnect between the perception of cyber charter schools and the reality of cyber charter schools. Every time an organization, news outlet, trade association, or an elected official misrepresents the reality of cyber charter schools, the discourse needed to create meaningful reform is harmed. We, as cyber school educators, accept some of the responsibility for these misconceptions as we have clearly not been as effective as we need to be in educating policy makers and the general public on how we operate. But I would suggest that the blame is equally shared by those who make unfounded statements and accusations about cyber charter schools in an effort to sway public opinion. In order to dispel some of the most common misconceptions about cyber charter schools, let me state the following:

We are not private schools as some of stated; we are public schools and as such do not “charge tuition”. Cyber charter reimbursements are calculated by each of Pennsylvania’s 500 public school districts and reflect the investments their taxpayers make in students; our families are also taxpayers and they deserve the same investments in their education. Tax dollars do not belong to school boards; they belong to the students who most directly benefit from them – regardless of where they choose to attend school. Because we receive public funding, we are held to the same standards of how we spend that money as all other public schools. We are subject to being audited by the Attorney General’s Office, we must conduct our own audit, we must competitively bid contracts, and we must adhere to the state’s Sunshine law as well as

Right to Know law. The demonization of our schools based on the notion that taxpayer money is not accounted for in a transparent or responsible way is not just misleading, it is patently false. These misperceptions, and many others, do not only insult our employees, but also insult the families who made the decision to leave their traditional school and enroll children in our school. If the intent is to have a constructive dialogue about how best to reform the system to benefit all students, I welcome this opportunity to meet with the Republican Policy Committee to make sure that we eliminate these falsehoods and misperceptions.

I also believe it is critical that policy makers fully understand and recognize the difference between a cyber program and a cyber school. It is commonly stated that it costs a fraction of what we are reimbursed to educate a student, yet this ignores the fact that we are a comprehensive public school. We have over 800 full-time employees, including 300 Pennsylvania certified PSEA teachers, principals and other administrators, advisors, counselors, a business office, a large tech team, and others who support our students and their families, both in and out of the classroom. We have buildings in Midland to accommodate both our staff and students, nine regional offices and staff across the Commonwealth, hundreds of extracurricular activities like prom, school newspaper, STEM education, field trips and dozens of clubs. We provide every student with laptops, laptop cameras, printers and, when needed, internet connection. We believe there needs to be dialogue around reform about how charter schools are funded, and in fact, we took a proactive step several years ago in proposing a change, but any change needs to recognize that cyber programs and cyber schools are very different and have very different resource needs.

To be specific, PA Cyber passed a budget anticipating \$170 M in revenues for the 2022-2023 fiscal year. We budget \$12,500 per regular education student and \$24,000 per special education student. Of that amount, \$160 M is generated from school district reimbursements and the remainder from various state and federal programs. \$116 M is devoted to instructional expenses and \$58 M for administrative support. At PA Cyber we do not have an educational management organization or charter management organization to whom we pay any public money. Also, except for the initial round of covid relief, ESSER 1, in the amount of \$2.4 M, we have returned additional rounds of this funding, totaling tens of millions of dollars, to the PDE. We believe we are responsible stewards of public money.

I want to take a few minutes to address special education students. We have over 2300 special education students with IEPs that we must fully accommodate, including \$2 M in unreimbursed transportation costs. As a point of information, the vast majority of students who come to PA Cyber already have an IEP developed by their previous public school; in fact, over the past fourteen years, we have only identified an average of sixty-five students a year as qualifying for an IEP. This is another fact that is contrary to the false narrative by some that we are purposely monetarizing these students for financial gain.

It is often said that a zip code should not determine whether or not a child receives a quality education, and throughout the pandemic, there was an increased focus on equity in education. Part of the value of cyber charter schools is that we have overcome that challenge by ensuring that all our students have the same computers, printers, and internet reimbursements. In addition, we have our own technology team who not only respond to student and staff questions but prepare and repairs hardware. All our students have access to

the same teachers, curriculum, support systems, and extracurricular activities – regardless of where they live. In some respects, we have been able to overcome much of the inequity that exists amongst school districts.

As some policy makers have proposed a standard statewide reimbursement rate to provide “equity”, this discussion should include equity in funding for all public schools, not just cyber schools. If policy makers can ensure that every traditional public school in Pennsylvania is funded equitably, then the issue of different cyber school reimbursements will disappear. Until that occurs, cyber families should receive the full benefit of the taxes that they pay to educate their kids. It is simply unfair to argue that a student attending a cyber school is worth less than if she or he stayed in the school district.

This seems simple enough given we teach children the age-old adage of “fair is fair” and expect them to understand its applicability, yet we appear to get bogged down in the minutia when we discuss charter school reform, to the point where we consistently talk past one another in terms of fairness. PA Cyber is committed to raising the quality and respect of the dialogue on this matter, and we would welcome any interested party who commits to the same. Reform is needed and can be achieved working together through the lens of honesty, fairness, equity, and transparency.

Thank you again for allowing me to participate in today’s hearing, and I look forward to answering any questions you might have for me.