

**Building Sustainable Charter Schools:
A Training Manual and Reflection Tool
for Colorado Charter School Governing Boards**



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Education (CDE) Schools of Choice Unit's *2023 State of Charter Schools Triennial Report* (2024), seventy-nine charter schools closed between 1997 and 2023. Poor academic performance, low enrollment, financial insecurity, and mismanagement are among the reasons cited for these closures (Burris, 2024). Successful charter schools significantly outnumber those that have closed, and according to the National Association of Charter School Authorizers (2023b), effective board governance is a key factor in that success. Charter school governing boards play a critical role in ensuring academic success and organizational sustainability. The National Association of Charter School Authorizers notes that "a school with strong governance is more likely to have efficient operations, sound finances, and strong learning outcomes for students" (2023a, p. 64).

In 2021, the National Charter School Resource Center released a report titled *Identifying Indicators of Distress in Charter Schools, Part 2: The Roles and Perspectives of Charter School Leaders and Board Members*. In this publication, they identified six indicators in which charter schools often exhibit early warning signs of distress. They include:

- Leadership
- Governance
- Finance and Operations
- Talent
- Culture
- Instruction

If a board identifies signs of distress early, it can likely intervene before problems become widespread and difficult to resolve. Because each of the six indicators can be complex, and board members may not have the skills and knowledge in every area, this training manual aims to support boards to develop their capacity to recognize, monitor, and respond to early signs of school distress.

Using the Manual

This training manual supports charter school governing boards in reflecting upon where their school falls on a continuum from signals of success to signals of struggle across key indicators and metrics. This manual is organized into six indicator sections. Instead of exploring every nuance of each indicator, three key metrics have been selected.

Indicator	Metrics
Leadership	<ul style="list-style-type: none">● Leading school improvement● Leadership responsibilities● Feedback and growth
Governance	<ul style="list-style-type: none">● Board member skill sets● Board deliberation● Board strategy
Finance and Operations	<ul style="list-style-type: none">● Student enrollment● Budget management● Financial controls
Talent	<ul style="list-style-type: none">● Staff retention● Staff capacity● Staff development
Culture	<ul style="list-style-type: none">● Student culture● Staff culture● Community Culture
Instruction	<ul style="list-style-type: none">● Academic progress● Quality resources● Systems of support

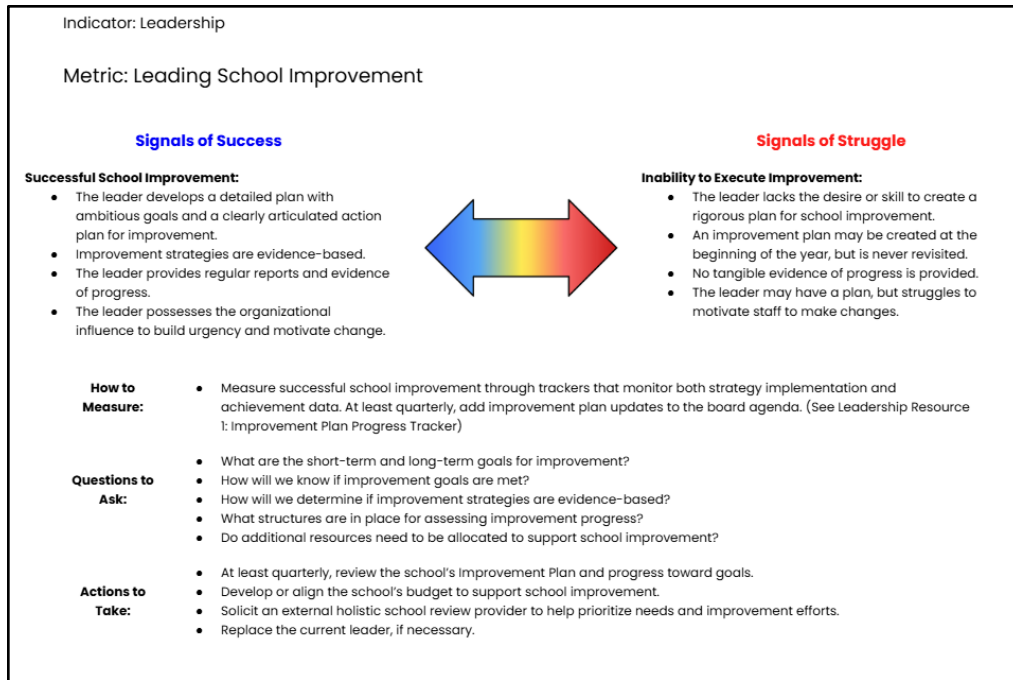
While boards may choose to review the indicators all at once, many find it more practical to distribute them throughout the year so they align with the board’s existing governance calendar. Integrating indicator reviews into routine board work allows governing boards to monitor key signals without creating additional processes or overloading meeting agendas. The following chart provides one example of how indicators may align with common board responsibilities.

Month	Board Calendar Task	Indicator(s) to Review
September	Review state assessment data and fall benchmark data	Instruction
October	Review stakeholder survey data and student engagement data	Culture
January	Review initial enrollment projections and draft budget	Finance and Operations
March	Conduct board elections and governance reflection	Governance
April	Complete executive leader evaluation	Leadership and Talent

In addition to distributing indicator reviews across the board calendar, governing boards may assign specific indicators to standing committees for deeper analysis. Committees can review relevant evidence, discuss potential signals of success or struggle, and provide summary findings and recommendations to the full board. This structure allows the board to maintain strategic oversight while ensuring that indicators receive thoughtful and informed review.

Committee	Indicator(s)
Governance Committee	Governance
Finance Committee	Finance and Operations
School Accountability Committee	Instruction and Culture
Leader Evaluation Committee	Leadership and Talent

Throughout the manual, each indicator section starts with an introduction explaining why the indicator impacts school success, as well as narrative descriptions of each metric. Then the metric continuum graphics are presented. Below is a sample graphic.



Using the provided [***Indicator Reflection and Planning Tool***](#), boards can assess current available evidence aligned with Signals of Success or Signals of Struggle to decide if a metric is “low risk,” “mid risk,” or “high risk.”

Risk Level	Meaning	Board Response
Low Risk	Practices align with Signals of Success	Continue routine monitoring
Mid Risk	Mixed signals of success and struggle	Monitor closely and request additional information
High Risk	Practices align with Signals of Struggle	Prioritize for board discussion and follow-up

The board can then determine if the metric warrants further monitoring. If the board decides to monitor a particular metric, the manual provides suggestions for

measuring it under “How to Measure.” Then, the manual provides boards with a set of potential questions they can ask school leaders to dig deeper into each metric under “Questions to Ask.” A menu of “Actions to Take” describes ideas for boards to explore if they need to support the school in that specific area. Finally, select resources and templates are included to support the implementation of recommendations at the end of each chapter. Boards can use each component for reflection when completing the [Indicator Reflection and Planning Tool](#). Below is a sample of a segment of the tool completed.

Indicator	Metric	What current evidence is available to inform our rating of this metric?	Risk Level	Monitor?	How will the Board Monitor/Measure Success?	What key questions will we ask?	What actions might we take?
Leadership	Leading school improvement	IIP, student data	Mid Risk	Yes	Quarterly improvement plan updates	What are the short-term and long-term goals for improvement? How will we know if improvement goals are met?	At least quarterly, the board will review the school's progress towards goals.
	Leadership responsibilities	Job descriptions, leader reports	Low Risk	No			
	Feedback and growth	Staff surveys, leader evaluation	Mid Risk	Yes	Staff surveys	How is leadership intentionally building relationships with staff?	Hire an executive coach to work with the school leader on collaboration and accepting feedback.

One effective way to integrate indicator monitoring is by linking each indicator or metric directly to the school’s strategic plan priorities. Most strategic plans include a small set of multi-year goals related to areas such as academic achievement, organizational sustainability, talent development, and community engagement. Many of the indicators included in this manual naturally align with these priorities. Boards can map specific indicators to each strategic goal and use them as checkpoints to monitor progress toward desired outcomes.

Boards that already conduct regular strategic plan monitoring, such as quarterly reviews of strategic dashboards or annual goal reflections, can incorporate the review of relevant indicators into these existing routines. Embedding indicator reflection into established monitoring practices allows boards to strengthen oversight while maintaining a clear focus on the school’s strategic priorities.

The ideas in this manual are not the only solutions to explore. It is highly encouraged to partner with your school leader to solve complex school challenges. This manual is intended solely as a research-informed starting point for reflection and conversation.

The training manual concludes with resources for designing a dashboard monitoring tool. A dashboard alone will not support school success. The metrics on a dashboard are evidence of the systems that exist within a school. A dashboard, in combination with monitoring and action, will support boards and administrators to lead sustainable schools. Many boards know they should review school data, but

may not know exactly what to monitor. Being presented with data is only the first step. Board members may be unable to interpret or act on data presented. By understanding how to interpret the data, key questions to ask, and potential actions to take, tools like data dashboards become more actionable resources.

Indicator Elements		
Metric	Signals of Success	Signals of Struggle
Questions to Ask	Actions to Take	Resources

Note. Components included for each metric.

Indicator: Leadership

Introduction

The charter school governing board is responsible for overseeing the school's executive administrator, often titled principal, executive director, or CEO. The effectiveness of this leader is one of the most significant determinants of a school's overall success and long-term sustainability. Research from The Wallace Foundation (2021) identifies principal leadership as one of the most important school-related factors contributing to student learning, in part because the principal's effectiveness influences all students. Their researchers also found that principals have documented impacts on attendance and discipline as well as teacher outcomes such as job attitudes and retention. For charter school governing boards, supporting and supervising an effective school leader is a critical component of maintaining school performance, organizational health, and long-term sustainability.

Indicator	Metrics
Leadership	<ul style="list-style-type: none">• Leading school improvement• Leadership responsibilities• Feedback and growth

Leading School Improvement

Successful school leaders drive organizational change that results in improved student achievement while simultaneously empowering and motivating staff to take purposeful action (Meyers & VanGronigen, 2021). In *How Principals Affect Students and Schools*, The Wallace Foundation (2021) explains that high-impact principals demonstrate strong organizational management skills, including the ability to establish measurable goals and think strategically about how to align time, talent, and resources to achieve those goals. They build coherent systems rather than isolated initiatives.

Part of leading effective school improvement is understanding how the school's strategic plan and improvement plan work together. Charter school governing boards are primarily responsible for establishing the school's long-term

strategic direction, typically through the development of a strategic plan that outlines priorities for the next three to five years (Colorado Charter School Institute, n.d.). The strategic plan focuses on advancing the school’s mission, vision, and values by identifying broad organizational goals related to academic performance, sustainability, and growth.

In contrast, the school’s annual improvement plan is generally developed by school leadership and staff and should directly support the priorities outlined in the strategic plan (Funding for Good, 2024). While the strategic plan establishes long-term priorities, the improvement plan translates those priorities into school-specific goals, measurable targets, and detailed action steps for the year (Illinois State Board of Education, 2025). Effective school leaders ensure alignment between these two planning tools and manage the implementation of both plans in a coordinated way. When the strategic plan and improvement plan are clearly connected, schools are better positioned to maintain focus on long-term goals while making meaningful progress through annual improvement efforts.

Strategic Plan	Improvement Plan
Long-range plan (3-5 years)	Short-range plan (1 year)
Focused on mission, vision, and values	Focused on systems and processes in the school
Broadly stated priorities	School-specific goals and action steps
Created with input from the board, school leaders, families, school staff, and community	Created with input from school leaders, school staff, and school accountability committee

For governing boards, evidence of effective improvement leadership should be visible. School leaders should be able to articulate the evidence-based strategies being implemented, explain why those strategies were selected, and provide clear data demonstrating how progress is being monitored throughout the year. This transparency enables boards to fulfill their oversight responsibilities while ensuring that improvement efforts remain focused, strategic, and results-driven.

Leadership Responsibilities

Leading a charter school requires a complex set of skills, from maintaining a facility to instructional pedagogy. Frumkin and colleagues (2011) identify three responsibilities that distinguish charter school leaders from their counterparts in traditional public schools: actively marketing the school to families, locating and financing facilities, and fundraising to support supplemental programming. In addition, school leaders must be competent in managing mission, finances, human resources, board relationships, and instruction. While many leaders enter the role with significant strengths in particular domains, no single individual possesses equal expertise across all areas. As a result, building and empowering a capable leadership team is essential to building sustainable schools.

Diverse Skills of a Charter School Leader



One strategy for meeting the demands of this multifaceted role is embracing a distributed leadership approach. Distributed leadership emphasizes the collective and collaborative nature of leadership, recognizing that responsibility and influence are shared across individuals within the organization (Bastea et al., 2023). Distributed leadership intentionally leverages the skills and expertise of others. In addition to sharing responsibility and accountability, distributed leadership broadens

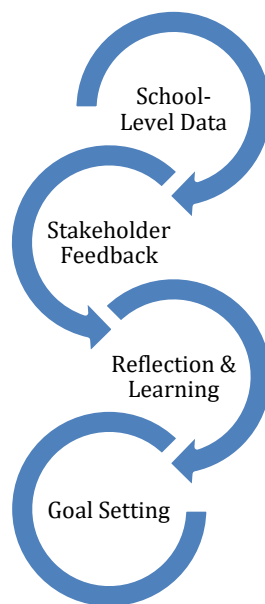
perspectives in decision-making, fosters innovation, and increases staff engagement.

For governing boards, evidence of distributed leadership should be visible in both structure and practice. Boards can examine leadership team structures and job descriptions to ensure responsibilities are aligned with individual strengths and are not concentrated solely with the executive leader. They may also look for formalized pathways for teacher leadership, documented processes for collaborative decision-making, and evidence that staff input informs strategic and instructional initiatives. When leadership is appropriately distributed, the organization is more resilient, less dependent on a single individual, and better positioned for long-term sustainability.

Feedback and Growth

Effective school leaders view feedback as a catalyst for growth. They model a growth mindset, demonstrating a belief that leadership capacity can be strengthened through persistence, reflection, and continuous learning (New Leaders, 2024). Leaders who actively seek feedback, remain open to new ideas, and adjust their practice accordingly signal to their staff that growth is both expected and supported across the organization.

Feedback & Growth Cycle



Research also suggests that leader humility plays a critical role in organizational effectiveness. Principals who acknowledge mistakes rather than leading with superiority cultivate stronger teacher commitment (Gaskell, 2023). Leader humility contributes to a culture of trust, collaboration, and innovation, all conditions associated with improved instructional practice and stronger student outcomes. When leaders demonstrate vulnerability and a willingness to learn, they normalize reflective practice throughout the school community.

For governing boards, evidence of a leader’s commitment to feedback and growth should be visible within formal evaluation processes and ongoing interactions. One of the board’s primary responsibilities is to evaluate the executive leader through a structured cycle of goal setting, progress monitoring, and reflection. Effective leaders set meaningful goals informed by stakeholder feedback, performance data, and organizational priorities. They can articulate how feedback has shaped their professional development and identify specific actions taken to strengthen their leadership practice. When boards intentionally support leader growth while holding clear expectations for performance, they reinforce a culture of accountability and continuous improvement.

Note on Replacing a Leader:

“Replace the current leader, if necessary” is a potential action to take listed on two of the following Metric Continuums. Although replacing a school leader is a governance action that can, in some circumstances, lead to school improvement, it should not be the board’s first response when early signs of struggle emerge. Leadership transitions are disruptive, resource-intensive, and carry significant risk. Strong school leaders are hard to find, and there is no guarantee that an applicant pool for a vacant position will yield a more effective candidate than the leader currently in place. Investing in the growth and development of the current leader, when there is a willingness to improve, often provides greater stability and stronger long-term results for the school community.

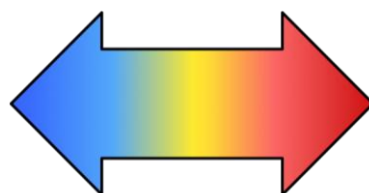
Indicator: Leadership

Metric Continuum: Leading School Improvement

Signals of Success

Successful School Improvement:

- The leader develops a detailed annual plan, tied to strategic priorities, with ambitious goals and a clearly articulated action plan for improvement.
- Improvement strategies are evidence-based.
- The leader provides regular reports and evidence of progress.
- The leader possesses the organizational influence to build urgency and motivate change.



Signals of Struggle

Inability to Execute Improvement:

- The leader lacks the desire or skill to create a rigorous plan for school improvement.
- An improvement plan may be created at the beginning of the year, but is never revisited.
- No tangible evidence of progress is provided.
- The leader may have a plan, but struggles to motivate staff to make changes.

How to Measure:

- Measure successful school improvement through trackers that monitor both strategy implementation and achievement data. At least quarterly, add improvement plan updates to the board agenda. (See Leadership Resource 1: Improvement Plan Progress Tracker)

Questions to Ask:

- What are the short-term and long-term goals for improvement?
- How will we know if improvement goals are met?
- How will we determine if improvement strategies are evidence-based?
- What structures are in place for assessing improvement progress?
- Do additional resources need to be allocated to support school improvement?

Actions to Take:

- At least quarterly, review the school's Improvement Plan and progress toward goals.
- Develop or align the school's budget to support school improvement.
- Solicit an external holistic school review provider to help prioritize needs and improvement efforts.
- Replace the current leader, if necessary.

Indicator: Leadership

Metric Continuum: Leadership Responsibilities

Signals of Success

Distributive Leadership:

- Leadership equally distributes major responsibilities, decisions, and projects.
- External support is brought in when needed.

How to Measure:

- Measure major leadership responsibilities in the job description, review staff survey data, and notice if your leader is missing deadlines or appears overwhelmed.

Questions to Ask:

- How is leadership shared among staff?
- In the last month, how have staff participated in leadership and decision-making?
- What are the decision-making processes at the school?
- What mechanisms exist for staff to provide input on policies and procedures?
- What are the pathways for staff to take on additional leadership roles within the school?

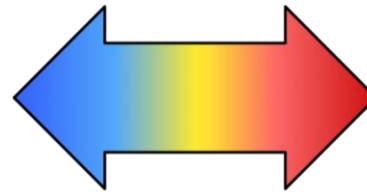
Actions to Take:

- Hire an executive leadership coach to work with the school leader on expanding distributed leadership skills.
- Work with the school leader to create a decision-making matrix that clearly communicates shared decision-making responsibilities. (See Leadership Resource 1: Decision-Making Matrix)
- Evaluate the budget to see if the leadership team can be expanded. Ensure job-description clarity.
- Make money available to hire an external consultant to support major projects.

Signals of Struggle

Overextended Leadership:

- Few leaders, maybe just one, take on most of the responsibilities and projects, and leaders struggle to accomplish all of them.



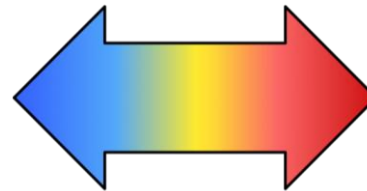
Indicator: Leadership

Metric Continuum: Feedback and Growth

Signals of Success

Collaborative Leadership:

- Possesses humility and a growth mindset.
- Open to feedback and willing to try new ideas suggested by others.
- Recognizes the importance of collaboration and seeks outside help when needed.
- Fosters meaningful connections with stakeholders.



Signals of Struggle

Insular Leadership:

- Defensive or suspicious of new ideas.
- Resistant to feedback.
- Inability to ask for or receive help when needed.
- Distrust in external experts or advisors, seeing them as threats.
- Struggles to build relationships with staff, parents, board members, community, and/or authorizer.

How to Measure:

- Measure feedback and growth through stakeholder surveys, board/leader interactions, leaders' ability to set meaningful goals based on feedback, and end of year leadership self-reflections.

Questions to Ask:

- How is leadership collaborating with internal and external stakeholders to solve complex problems?
- How is leadership using stakeholder feedback to inform new initiatives?
- How is leadership intentionally building relationships with staff, parents, board members, community, and authorizer?
- What is stakeholder perception data saying about leadership collaboration and partnership?

Actions to Take:

- Hire an executive leadership coach to work with the school leader on collaboration and accepting feedback.
- Conduct stakeholder surveys to garner perceptions of leadership collaboration and connection.
- Ensure the governing board has a robust leader evaluation in place that includes a leader self-assessment and reflection. (See Leadership Resource 2: Leader Evaluation Template)
- Replace the current leader, if necessary.

Leadership Resource 1: Decision-Making Matrix

A key indicator of effective decision-making is clarity around the amount of say people have in a decision. A decision-making matrix is organized around *the levels of empowerment* stakeholders have in various key decisions (Bens, 2012). While the school administrator is ultimately responsible for the major decisions that guide the school's operations, involving others in the decision-making process whenever possible helps facilitate a collaborative culture, increases teacher efficacy, and often leads to better decisions.

Charter school board decides with input from stakeholders.	Administrators decide and then tell staff.	Administrators gain input before deciding.	Staff decide and recommend.	Staff decide and act.
Charter school boards make decisions about the school's budget, policies, and leadership to ensure academic success and financial sustainability. Accountability: Board	The administrators make decisions considering board and district policy and state law. These decisions are usually directives. Accountability: Administrator	People impacted by the decision are consulted and can give input into the decisions that administrators ultimately make. Accountability: Administrator	People or groups of people (i.e., committees) decide by themselves but must consult their supervisors before acting to get approval. Accountability: Shared	People or groups decide and take action without getting anyone else's approval. Must still consult school policies. Accountability: The person making the decision
Examples of Decisions: -Creating the school's mission and vision -Creating school policies -Hiring/retaining the lead administrator -Approving the budget -Approving the calendar -Charter Renewal	Examples of Decisions: -Crisis response -Safety concerns -Emergency protocols -Weather-related issues -Media Relations -Suspensions -Staff evaluations -Retention of staff	Examples of Decisions: -Master Schedule -Class lists -Staff PD -Building usage -Promotion/grade skipping for students -Hiring staff -Assessment schedule	Examples of Decisions: -Field trips -Afterschool clubs -Supplementary curriculum resources -External professional development -School initiatives -Class events	Examples of Decisions: -Daily lessons -Family contact -Day-to-day classroom operations -Classroom discipline -Grade-level newsletter content -Student work displays

Leadership Resource 2: Leader Evaluation Template

EXECUTIVE DIRECTOR EVALUATION		
Executive Director		
Board of Director Leading Evaluation		
Review Period		
Section I. Achieving Goals		
Directions: Identify Executive Director's overall goals and corresponding results.		
GOALS	RESULTS	Rating E: exceeds M: meets P: partially meets D: Does not meet
Goal 1		
Strategic Goal: ED Goal: Action Steps:	Baseline Data:	Mid-Year Rating: End-of Year Rating:
Goal 2		
Strategic Goal: ED Goal: Action Steps:	Baseline Data:	Mid-Year Rating: End-of Year Rating:
Goal 3		
Strategic Goal: ED Goal: Action Steps:	Baseline Data:	Mid-Year Rating: End-of Year Rating:
Section II. Demonstrating Competencies		
Directions: Reflect on the Executive Director's demonstration of the essential functions based on the job description.		
Essential Function	Reflection	
Vision and Strategy	Self-Reflection: Board Reflection:	

Finance and Business Operations	Self-Reflection: Board Reflection:
Staff Management	Self-Reflection: Board Reflection:
Curriculum Management	Self-Reflection: Board Reflection:
Governance	Self-Reflection: Board Reflection:
Legal/Compliance	Self-Reflection: Board Reflection:
Facilities	Self-Reflection: Board Reflection:
Section III. Summary Assessment, Next Steps, and Professional Development	
Overall Performance Rating (Highlight One) Exceeds Expectations - Meets Expectations - Partially Meets Expectations - Does Not Meet Expectations	
Qualitative Comments:	
<p>What are the 1-3 most notable areas of strength?</p> <ul style="list-style-type: none"> • Self-Reflection: • Board Reflection: <p>What are the 1-3 areas for growth or improvement?</p> <ul style="list-style-type: none"> • Self-Reflection: • Board Reflection: <p>What are the next steps for growth or improvement in terms of the Executive Director's professional development?</p> <ul style="list-style-type: none"> • Self-Reflection: • Board Reflection: 	
Mid-Year Executive Director Signature:	Date:
Mid-Year Board Member Signature:	Date:
End-of-Year Executive Director Signature:	Date:
End-of-Year Board Member Signature:	Date:

Indicator: Governing Board

Introduction

Strong governance is essential for charter school success. Effective governing boards use data analysis and community input to gauge the school's needs. Board members have the skill and capacity to govern and work to build their skills through continuous development. Boards set strategic priorities and long-term plans for the school. Charter Success Partners (2025) defines five habits of effective charter school board members.

- *Mission Aligned:* All board decisions should connect directly to the school's mission.
- *Financial Understanding:* At least one board member should have a strong understanding of the school's finances. This person often serves as the Board Treasurer.
- *Focus on Governance:* The Board stays in its strategic oversight lane and does not micromanage operations.
- *Participate Fully:* Board members show up to meetings prepared to engage.
- *Invest in Development:* Board members continually learn as education shifts.

Engaged, mission-driven boards keep schools accountable. "When boards don't function well, schools can miss deadlines, mismanage funds, or lose sight of what matters most: student success" (Charter Success Partners, 2025, para. 4).

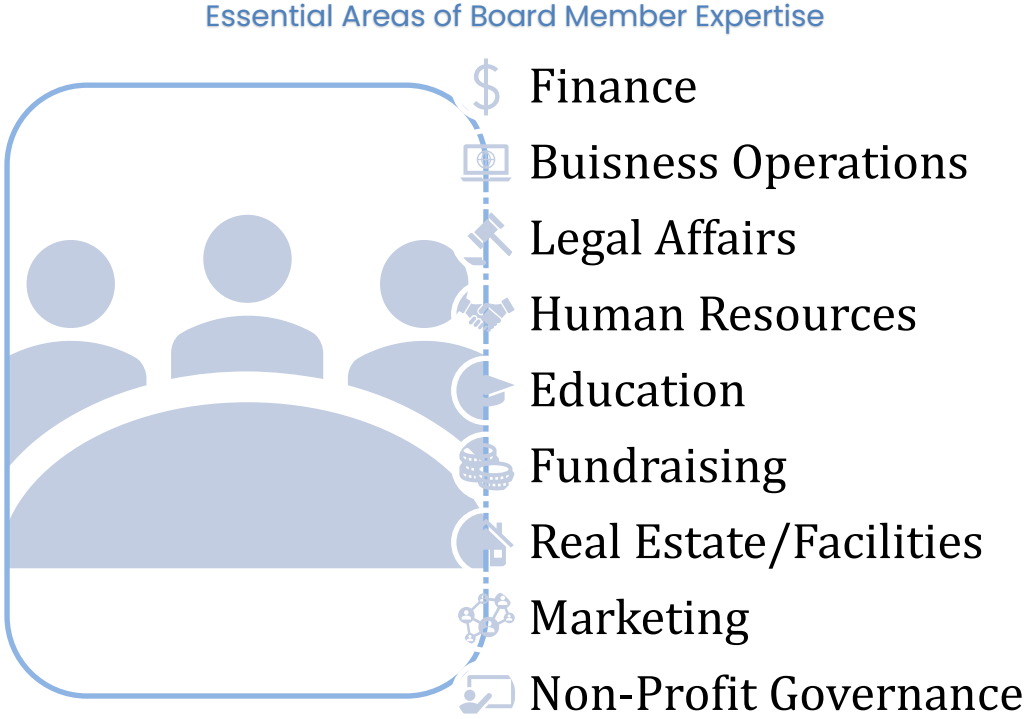
Indicator	Metrics
Governing Board	<ul style="list-style-type: none">● Board member skill sets● Board deliberation● Board strategy

Board Member Skill Sets

Effective charter school governance depends on the intentional composition of the governing board. The Colorado League of Charter Schools (2025) emphasizes

the importance of building a strategically composed board that includes individuals with a wide range of skills necessary for effective governance. Recommended areas of expertise often include finance, business operations, legal affairs, human resources, real estate and facilities, education, fundraising, nonprofit governance, charter school law and regulations, marketing, and professional development.

GrowSchools similarly underscores the importance of purposeful board composition. In *Recruit and Manage Your Board: The Charter School Board Governance Guide*, the organization emphasized that “your charter board is more than a group of well-meaning volunteers. Rather, it’s a highly effective team, strategically assembled, to bring the skills, expertise, temperament, and time to govern a multi-million-dollar organization” (GrowSchools, 2023, p. 17). To govern responsibly and achieve both strategic priorities and annual goals, boards must include members whose expertise aligns with the school’s mission and governance needs.



For governing boards, evidence of appropriate skill diversity can be gathered through structured skills assessments administered to both current and prospective members. A simple matrix or self-assessment questionnaire can identify areas of

strength and reveal gaps that may limit the board’s effectiveness. These findings should inform intentional recruitment strategies, succession planning, and targeted professional development. By regularly assessing and addressing skill gaps, boards position themselves to govern proactively rather than reactively, strengthening both oversight and long-term sustainability.

Board Deliberation

Active board member participation extends far beyond simply attending meetings. Effective governance requires thoughtful deliberation: asking probing questions, seeking clarification, challenging assumptions, exploring alternative perspectives, and engaging in constructive debate. High-functioning boards create space for rigorous discussion before decisions are made, recognizing that strong governance depends on informed judgment rather than passive approval.

Deliberation strengthens decision-making by elevating diverse viewpoints and reducing the risk of groupthink. When board members thoughtfully examine proposals, analyze risks, and weigh strategic implications, they increase the likelihood that decisions align with the school’s mission, long-term sustainability, and student outcomes. Boards must be informed and engaged to fulfill their oversight duties (BoardSource, 2021). To support this, board members must be given enough time to review meeting materials, typically one week.

Board Deliberation Questions for Governing Boards



For governing boards, evidence of meaningful deliberation can be gathered through observation of meeting dynamics. Indicators include balanced participation among members, substantive questioning, and documented discussion prior to formal votes. Boards may also utilize structured meeting audits, conducted internally or by an external observer, to analyze participation patterns and the proportion of time allocated to presentations versus discussion. Monitoring these patterns helps ensure meetings prioritize governance-level deliberation rather than information-sharing alone.

Board Strategy

Determining the strategic direction of the school is one of the governing board's most critical responsibilities. The board must establish the long-term vision and priorities that will guide the organization's academic, financial, operational, and cultural trajectory over a three- to five-year period. Strategic planning is not simply the creation of a document. It involves clarifying the school's vision and translating that vision into measurable goals that can be monitored, evaluated, and adjusted over time (National Charter Schools Institute, 2024). As explained by the Colorado Charter Schools Institute (n.d.), "The strategic plan becomes the guide the board and school leader use to align leadership and improvement efforts. It allows the board to focus on effective governance processes and the school leader to direct their efforts on operational leadership practices" (p. 1).

For governing boards, evidence of board strategy can be seen in board documents and processes. Boards should maintain current strategic plans, multi-year financial projections, and clearly aligned annual goals that reflect long-term priorities. Boards can assess the amount of meeting time spent on long-term strategy compared to operational or day-to-day issues. When boards consistently engage in strategic planning and monitoring, they shift from reactive governance to proactive leadership. Rather than responding to isolated challenges, they guide the school through intentional improvement efforts that support school sustainability.

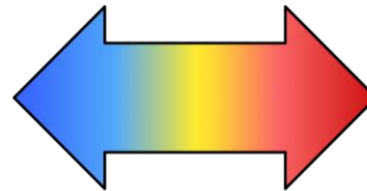
Indicator: Governing Board

Metric: Board Member Skill Sets

Signals of Success

Complete Skills:

- Board members have diverse skill sets covering all major categories (i.e., governance, finance, real estate, HR, education, community relations, marketing, and stakeholder engagement).
- Board members contribute diverse experiences & perspectives.
- Conflicts of interest are disclosed if they exist.



Signals of Struggle

Incomplete Skills:

- The board lacks specific skills to effectively monitor and maintain accountability in all major categories.
- Board members have similar perspectives or backgrounds, which may lead to groupthink.
- Conflicts of interest (e.g., friends with the school leader) may interfere with discussion and decision-making.

How to Measure:

- Measure member skills in areas such as governance, finance, real estate, HR, education, community relations, marketing, and stakeholder engagement through a skills questionnaire.

Questions to Ask:

- What skills are represented by current board members?
- What skills are not represented?
- Are we planning major initiatives that require specific skills?
- Are there conflicts of interest affecting our capacity to govern?

Actions to Take:

- Complete a board self-assessment.
- Intentionally recruit new board members based on skill gaps.
- Implement a robust onboarding process for new board members that includes completing basic board training.
- Engage in ongoing board training for the full board.

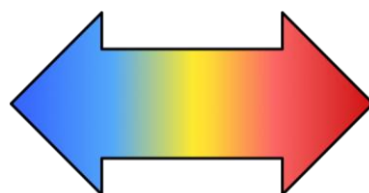
Indicator: Governing Board

Metric: Board Deliberation

Signals of Success

Active Deliberation:

- A variety of viewpoints are evident.
- Certifying and probing questions are asked.
- Ideas are respectfully challenged.
- Board members are engaged in the business of the school and take time to deliberate to ensure the best decisions are made.



Signals of Struggle

Lack of Deliberation:

- Limited discussion and short board meetings may indicate a lack of genuine interest in the school's business.
- Board members may feel uncomfortable voicing a dissenting opinion.
- The board easily accepts what the school leader wants to do.

How to Measure:

- Measure by observing board member participation, audit a board meeting, or look at meeting minutes.

Questions to Ask:

- How does the structure of board meetings encourage active deliberation?
- Are members coming to board meetings prepared for active deliberation?
- Are materials available far enough in advance?
- Does the board need additional training on key issues?
- Do board members feel comfortable voicing dissenting opinions?

Actions to Take:

- Modify the agenda to allow for more discussion and less reporting.
- Audit your board meeting. (See Governing Board Resource 1: Board Meeting Audit for Active Deliberation)
- Create board member norms that encourage questioning and discussion. (See Governing Board Resource 2: Governing Board Norms for Active Deliberation)
- Solicit opinions from those who have not yet provided one.
- Implement a robust onboarding process for new board members.

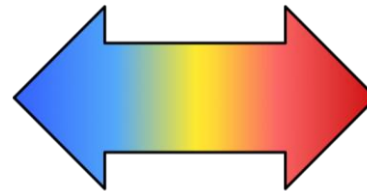
Indicator: Governing Board

Metric: Board Strategy

Signals of Success

Proactive Board:

- Proactively removes barriers and anticipates school needs through regular policy creation and revision.
- Creates three-to-five-year financial projections and plans for significant expenditures.
- Determines the strategic direction over the next three to five years.
- Engages in a regular strategic planning process, leading to key objectives and deliverables linked to the school's vision and mission.



Signals of Struggle

Reactive Board:

- Reactively addresses issues as they become evident.
- Has no long-term financial plan and budgets year-to-year.
- Lacks a long-term strategic vision and plan for the school. Plans year to year.
- Crosses into management by focusing on day-to-day decisions.

How to Measure:

- Measure by reviewing the board's strategic plan, five-year projections, and policy review protocols. Assess how much time during board meetings is spent on strategic priorities compared to reactive discussions and decisions.

Questions to Ask:

- How does the current strategic plan drive board agendas, committee work, and annual goals?
- Does the board maintain and regularly review three-to-five-year financial projections?
- What formal processes are used to review and revise policies on a regular cycle?
- How much of board meeting time is spent on long-term strategy vs. operational or day-to-day issues?

Actions to Take:

- Create a policy revision schedule. Utilize a Governance Committee to draft revisions for board review and approval.
- Work with the school's finance expert to create three-to-five-year financial projections.
- As a board or in partnership with an external consultant, engage stakeholders in a strategic planning process.
- Regularly review strategic plan objectives and deliverables to ensure the school remains on track to meet its goals.

Governing Board Resource 1: Board Meeting Audit for Active Deliberation

This audit is designed to assess the effectiveness of active deliberation in charter school governing board meetings. Board members and stakeholders can use this tool to evaluate meeting quality and identify areas for improvement.

Meeting Information

- Date:
- Time:
- Location:
- Chairperson:

Section 1: Preparation & Structure

✓ Were board members prepared for the meeting?

Yes No Somewhat

✓ Was the agenda provided in advance and followed throughout the meeting?

Yes No Somewhat

✓ Were materials (reports, data, background information) provided ahead of time?

Yes No Somewhat

✓ Was time effectively allocated to key agenda items?

Yes No Somewhat

✓ Did the meeting stay focused on strategic and governance priorities?

Yes No Somewhat

Section 2: Communication & Engagement

✓ Did all members have an opportunity to speak and contribute?

Yes No Somewhat

✓ Were discussions open, respectful, and constructive?

Yes No Somewhat

✓ Did board members actively listen and engage with each other's points?

Yes No Somewhat

✓ Were disagreements handled professionally and productively?

Yes No Somewhat

✓ Did board members ask insightful and clarifying questions?

Yes No Somewhat

✓ Were differing viewpoints acknowledged and considered?

Yes No Somewhat

Section 3: Decision-Making & Deliberation

✓ Were key decisions based on data, research, and informed discussion?

Yes No Somewhat

✓ Did the board engage in thoughtful debate before making decisions?

Yes No Somewhat

✓ Was there an effort to avoid groupthink and encourage critical analysis?

Yes No Somewhat

✓ Did board members remain solution-oriented rather than reactive?

Yes No Somewhat

✓ Were decisions clearly summarized and action steps assigned?

Yes No Somewhat

Final Observations & Recommendations

- What worked well in this meeting?
- What areas need improvement?
- Actionable steps for the next meeting:

Governing Board Resource 2: Governing Board Norms for Active Deliberation

Commitment to Mission & Vision

- Ensure all discussions align with the school’s mission and vision.
- Prioritize decisions that enhance student achievement and school success.

2. Come Prepared and Engaged

- Review meeting materials in advance to contribute meaningfully to discussions.
- Bring necessary documents, data, and questions to facilitate informed deliberation.
- Be ready to make thoughtful, well-informed decisions.

3. Open & Respectful Communication

- Encourage diverse perspectives and open dialogue.
- Listen actively and allow all members to voice their opinions.
- Critique ideas, not individuals.

4. Evidence-Based Decision Making

- Use data, research, and expert input to inform discussions.
- Seek clarity by asking thoughtful questions before forming opinions.

5. Structured and Purposeful Meetings

- Follow a clear agenda and focus on strategic priorities.
- Avoid unnecessary distractions or off-topic discussions.
- Allocate time fairly to ensure all members can contribute.

6. Culture of Inquiry and Debate

- Embrace a spirit of constructive debate and avoid groupthink.
- Challenge assumptions while remaining solution-oriented.
- Encourage board members to play “devil’s advocate” to test ideas.

7. Transparency and Accountability

- Make decisions in an open and transparent manner.
- Clearly document key discussions and rationale for decisions.
- Hold each other accountable for following board policies and norms.

8. Collaboration and Unity

- Work as a team and support board decisions once made.
- Foster an environment where all members feel valued.
- Maintain professionalism, even in disagreements.

9. Ongoing Learning and Improvement

- Participate in governance training and professional development.
- Regularly evaluate board effectiveness and adjust practices accordingly.
- Stay informed about best practices in charter school governance.

Indicator: Finance and Operations

Introduction

A charter school’s financial and operational health are vital to its continued existence. Effective boards engage in practices such as strategic budgeting, careful vendor negotiations, sound facilities financing, and strong financial controls. The Colorado League of Charter Schools’ (2023) School Quality Review Rubric outlines criteria for the board’s role in successful school operations, including the following:

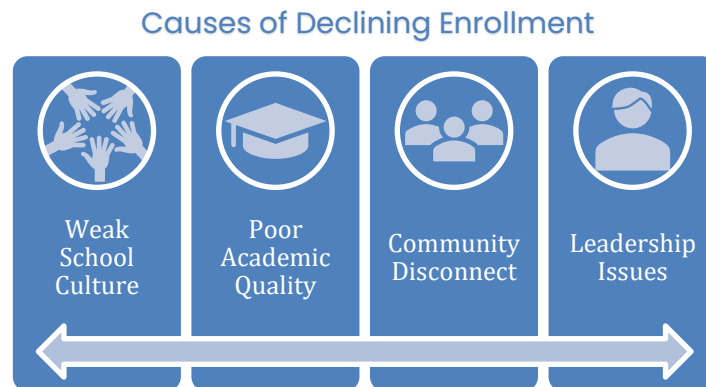
- The school practices appropriate risk management, including current insurance policies.
- There are systems for student recruitment and retention that result in meeting enrollment targets.
- The facility is maintained and compliant with all health and safety regulations.
- The Board sets and monitors progress toward financial goals related to the school’s long-term financial health.
- The budget creation process is based on data, including sound revenue and enrollment projections, involves multiple stakeholders, includes contingencies, and is aligned with required timelines.
- The Board sets goals around relevant operational systems, including school culture and disaggregated discipline data, and regularly monitors these goals.

Indicator	Metrics
Finance and Operations	<ul style="list-style-type: none">• Student enrollment• Budget management• Financial controls

Student Enrollment

Strong charter school boards understand the direct relationship between student enrollment, enrollment projections, and school funding. The number of students enrolled is the single most important driver of a school’s budget. In an analysis of 2022–23 charter school closures, Burris (2024) found that insufficient

student enrollment was the leading cause of closure among the schools studied. Declining enrollment is often not the root problem, but a symptom of deeper issues such as a weakening school culture, a deteriorating learning environment, a disconnected school community, or ineffective or toxic leadership.



When enrollment is stable, schools are generally able to sustain operations and deliver on their mission. When enrollment grows, schools may have greater flexibility to expand programming, invest in additional staff, and enhance student support. Conversely, prolonged enrollment decline places immediate and compounding strain on finances, staffing, and program quality.

For governing boards, student enrollment should be monitored regularly and intentionally. Boards can track enrollment by grade on a monthly basis and watch for patterns or unexpected fluctuations. Equally important, boards should critically review the enrollment projections used in the budgeting process to ensure they are reasonable and grounded in local context. For example, if a charter school is located in a community experiencing a decline in school-aged children, budgeting for significant enrollment growth may signal unrealistic assumptions and financial risk. Consistent enrollment monitoring enables boards to identify early warning signs and take proactive action to support school sustainability.

Budget Management

Effective charter schools make budget decisions using reliable data, including sound revenue and enrollment projections, and through a collaborative process that involves multiple stakeholders, incorporates contingency planning, and aligns with authorizer-required timelines. Once adopted, school finances are regularly

monitored to ensure revenues and expenditures remain consistent with the approved budget.

According to the Colorado League of Charter Schools (2025), governing boards should assess whether projected revenues and expenditures are realistic by comparing them to historical financial data. Budgets should align with strategic priorities outlined in the strategic plan or Unified Improvement Plan (UIP). Boards should also confirm that proposed budgets support long-term sustainability by meeting board-established reserve targets and by clearly identifying contingency plans if variable or uncertain revenues, such as grants and donations, do not materialize.

Budget Questions for Governing Boards

How was this budget developed, and who was involved in the process?

What assumptions are driving this year's budget (enrollment, per-pupil revenue, grants)?

Where do we see the greatest financial risk in this budget?

How does this budget align with our strategic priorities and long-term plan?

For governing boards, budget management is measured through consistent review of key financial reports, including budget-to-actuals, balance sheets, and annual audits. Boards can further strengthen oversight by requesting regular reporting on core financial indicators, such as days cash on hand, facilities costs as a percentage of per-pupil revenue (PPR), and unassigned fund balance, using a board-level financial dashboard. Strong budget management allows boards to ensure the school's resources are aligned with its mission, priorities, and long-term sustainability.

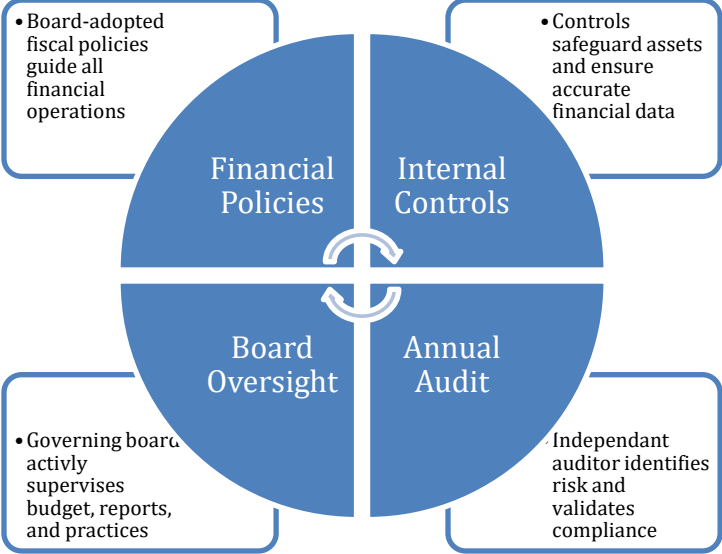
Financial Controls

Strong financial controls are foundational to charter school sustainability and transparency. As outlined by Charter School Success (2025), effective fiscal policies establish internal controls that safeguard assets, ensure the accuracy and integrity of financial information, maintain legal and regulatory compliance, promote operational efficiency, and support both financial and educational goals. Central to

these controls is active oversight by school leadership and the governing board. Financial controls and policies should ensure that no one single person can misuse funds. Approved processes should make it extremely difficult for any improper activity to occur or go undetected. Regular documentation, secure handling of funds, and clear separation of financial roles reduce the risk of fraud and mismanagement.

For governing boards, financial controls are measured by verifying that the school has comprehensive, board-adopted financial policies and internal control systems that are consistently implemented, routinely reviewed, and aligned with legal, regulatory, and authorizer requirements. Independent annual audits are a critical component of this oversight, providing objective validation of financial practices, identifying weaknesses or gaps in controls, and confirming compliance with generally accepted accounting principles and state requirements. Together, these practices allow boards to move beyond trust-based oversight toward systematic verification, strengthening financial integrity, accountability, and long-term sustainability (Charter School Success, 2025).

Key Components of Effective Financial Oversight



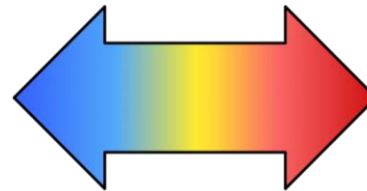
Indicator: Finance and Operations

Metric: Student Enrollment

Signals of Success

Stable or Growing Enrollment:

- Meets or exceeds annual enrollment goals.
- Stable enrollment enables the school to maintain ongoing operations and meet its mission.
- Growing enrollment allows for increased staff or programs.
- Student retention is high.
- Future enrollment projections are examined for long-term planning.



Signals of Struggle

Low or Decreasing Enrollment:

- Does not meet annual enrollment goals.
- Enrollment is not sufficient to maintain ongoing operations.
- Steady or sudden decreases in enrollment.
- Student enrollment may be stable, but student retention may be low.
- Future enrollment projections are ignored.

How to Measure:

- Measure student enrollment monthly and review stakeholder survey results for indicators of student and family satisfaction/dissatisfaction.

Questions to Ask:

- Why do students enroll at our school?
- Why do students leave our school?
- What initiatives can the board take to assist with student recruitment and retention?
- Does the school have a student recruitment and retention plan?
- Does the school have a robust marketing and social media plan? Is this reflected in the budget?

Actions to Take:

- Measure student enrollment monthly as part of a leader's board report.
- Form a committee to complete a student recruitment and retention plan internally or with a third party.
- Complete a survey to gauge parent and student satisfaction.
- Evaluate enrollment projections and local demographic data.
- Make funds available for marketing and student recruitment efforts.

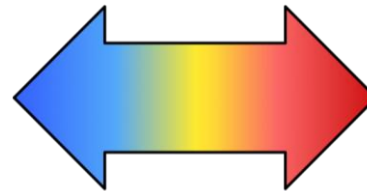
Indicator: Finance and Operations

Metric: Budget Management

Signals of Success

Managed Budget:

- Budget decisions are made with board and leadership deliberation.
- Line-item percentages generally meet the recommendations of 9–15% dedicated to facilities and 65% devoted to salaries/benefits.
- Budget decisions are based on data, including sound revenue and enrollment projections, involve multiple stakeholders, include contingencies, and are aligned with timelines.



Signals of Struggle

Inadequate Budget Management:

- Budget decisions are made by one person at the school, often the school leader.
- Facilities and salary costs are higher than recommended and unsustainable.
- Budget decisions lead to overspending, high debt, inefficiencies in operations, and the inability to afford basic needs.
- The board does not regularly monitor key financial reports.

How to Measure:

- Measure budget management by regularly reviewing key financial reports including budget to actuals, balance sheet, and annual audit. Create a financial dashboard to track key financial metrics such as days cash on hand, facilities cost % of PPR, and unassigned fund balance.

Questions to Ask:

- How was this budget developed, and who was involved in the process?
- What assumptions are driving this year's budget (enrollment, per-pupil revenue, grants)?
- Where do we see the greatest financial risk in this budget?
- How does this budget align with our strategic priorities and long-term plan?

Actions to Take:

- Utilize a Finance Committee to review draft budgets before full board approval.
- Require regular review of key financial reports (budget-to-actuals, balance sheet, cash flow). Train all board members on how to read these reports.
- Develop and maintain a board-level financial dashboard. Set thresholds that trigger deeper inquiry or action. (See Finance and Operations Resource 1: Financial Benchmark Dashboard)

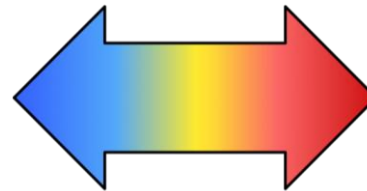
Indicator: Finance and Operations

Metric: Financial Controls

Signals of Success

Comprehensive Policies and Procedures:

- There are strong internal controls in place that are consistently followed.
- A comprehensive, board-adopted financial policies document is in place and followed by the board and school leadership.
- The school has clear protocols for regularly reviewing and revising financial policies and procedures.



Signals of Struggle

Weak Policies and Procedures:

- Internal controls are absent, making the school susceptible to financial errors, risk, abuse, and fraud.
- The board relies on trust or assumes the policies are being followed instead of systematically verifying that they are.
- Policies lack clarity around the separation of duties or purchase processes.
- Policies are not regularly reviewed and revised.

How to Measure:

- Measure financial controls by verifying that the school has comprehensive, board-adopted financial policies and internal controls that are consistently implemented, regularly reviewed, and aligned with legal and authorizer requirements.

Questions to Ask:

- When were the school's financial policies and procedures last reviewed by the board? By an independent auditor?
- Are the people involved in financial decisions knowledgeable about the policies and where to find them?
- Does the board need to adopt additional financial controls?

Actions to Take:

- Calendar an annual review of financial policies by the Finance Committee and bring recommended updates to the board for approval. (See Finance and Operations Resource 2: Finance Committee Action Plan)
- Have an independent certified public accountant audit the school's financial policies and procedures and make recommendations directly to the board.
- Make funds available for marketing and student recruitment efforts.

Finance and Operations Resource 1: Financial Benchmark Dashboard

Use this template as a foundation for creating a customized financial benchmark dashboard. Adjust what constitutes “red,” “yellow,” and “green” benchmarks based on board goals or authorizer requirements. Update “End of Year Projection” monthly and color code based on the benchmark key on the right of the chart. You can also customize the indicators based on school priorities or authorizer requirements.

	END OF YEAR PROJECTION (Adjust Monthly)	BENCHMARKS - Adjust Annually per Board Goals or Authorizer Requirements		
INDICATOR	June 30, 2025	Red	Yellow	Green
Days of Cash on Hand	94	<30	30-60	>60
Payroll & Benefits % of Total Revenue	66.3%	<60% or >80%	In line with Board Goals	60% - 80 %
Facility Cost % of PPR	19.9%	>20%	15-20%	<15%
Months of Unassigned Fund Balance	4.5	<0.6	0.6-1.5	>1.5
Market Debt Coverage Ratio	1.21	<1	1-1.15	>1.15
Students to Instructional Staff	7.8	>20	16-20	<16

Finance and Operations Resource 2: Finance Committee Action Plan

Members: (Must consist of a board member and school administrator. May also include parents and other staff.)

- Chair:
- Administrator:
- Board Member: (Treasurer)
- Parent:
- Staff:

Meeting Schedule:

General Purpose

This committee includes the school's business manager and board treasurer, and it reviews the budget and makes recommendations for any needed adjustments, assesses enrollment requirements, reviews annual compensation for staff, and makes recommendations to the board regarding any needed adjustments.

Responsibilities

1. Prepare an annual budget for the charter school in collaboration with the school leader.
2. Also, in collaboration with the school leader, develop and annually revise a five-year financial forecast and develop long-range financial plans based on the forecast.
3. Arrange for an annual audit to be provided to the Board.
4. Provide oversight of the procurement process.
5. Review monthly financial statements and variances from budget, and recommend action to the Board, as appropriate.
6. Create specific measurable board-level goals for the year as part of the full board planning process.
7. Develop and implement a board-level training program to ensure that all trustees (especially those without a financial background) can be effective stewards of the school's financial resources.
8. Report to the Board at regular meetings of the board in a manner determined by the Board.

9. Annually evaluate its work as a committee and the objectives it has committed itself to and report on the same to the Board.

Action Plan		
Goal	Deadline	Status
Review Monthly Financials Financial Audit and MD&A Review POLICY 8.1 – BUDGETING AND FINANCE	October	
Review Monthly Financials Review POLICY 8.2 – ACCOUNTING AND BUDGETING POLICIES POLICY 8.3 – CONTINUING DISCLOSURES POLICY 8.4 – CASH MANAGEMENT POLICY 8.5 – CASH RECEIPT PROCEDURE	November	
Review Monthly Financials Review revised budget (if needed) Review POLICY 8.6 – PURCHASING AUTHORITY/REVIEW AND APPROVAL OF VENDORS POLICY 8.7 – PURCHASING PROCEDURE	December	
Review Monthly Financials *Board Approves Amended Budget Begin Drafting 2026–27 School Year Budget Review POLICY 8.8 – LARGE PURCHASE POLICY POLICY 8.9 – PURCHASING CARD PROCEDURE POLICY 8.10 – PETTY CASH PROCEDURE	January	
Review Monthly Financials Review Draft 2026–27 School Year Budget First Round Enrollment Report Review POLICY 8.11 – ACCOUNTS PAYABLE/DISBURSEMENT PROCEDURE POLICY 8.12 – RESERVE REQUIREMENTS	February	
Review Monthly Financials Review Draft 2026–27 School Year Budget w/ Changes Draft Five-Year- Forecast Review POLICY 8.13 – PUBLIC GIFTS/DONATIONS POLICY 8.14 – TECHNOLOGY ACQUISITIONS POLICY 8.15 – FOOD SERVICES/NUTRITIONAL FOOD CHOICES	March	
Review Monthly Financials Finalize Five-Year Forecast and Present to Board	April	
Review Monthly Financials Annual Board Meeting - Present the annual work of the committee *Board Approves 2026–27 Budget	May	

Indicator: Talent

Introduction

Strong charter schools intentionally build and sustain a high-quality team. They ensure that every role is filled by competent and committed staff and that systems are in place to “identify, select, place, retain, and sustain these personnel, especially teachers and school-level leaders” (Evan & Canavero, 2020, p. 19). The governing board’s primary talent responsibility is to attract, develop, support, and retain an effective school leader who, in turn, establishes the systems and conditions necessary to recruit, develop, and retain impactful teachers.

Indicators within the talent domain often serve as a reflection of the health of other domains. Patterns such as high teacher turnover, difficulty filling key positions, or declining staff morale rarely exist in isolation. For example, persistent turnover can weaken instructional quality and destabilize school culture, and the root cause may stem from ineffective leadership.

Indicator	Metrics
Talent	<ul style="list-style-type: none">• Staff retention• Staff capacity• Staff development

Staff Retention

Colorado’s average staff retention rate for all public schools during the 2022–2023 school year was 77% (Colorado Department of Education, 2022). While statewide retention data specific to all charter schools is not readily disaggregated, available data suggests charters often experience lower staff retention than traditional public schools. While closely related, staff retention and staff turnover measure different aspects of workforce stability (Holliday, 2021). Staff retention reflects the percentage of employees who remain over a given period, with higher rates indicating greater stability. In contrast, staff turnover measures the percentage of employees who leave, with lower rates signaling a healthier organization. The turnover rate for schools authorized by the Charter School Institute, Colorado’s state

authorizer representing 46 charter schools, was 35.09% when comparing 2024–2025 to 2023–2024 staffing which is higher than the state average 20.18% (Colorado Department of Education, 2025a). Research by Buck (2023) further indicates that, in general, charter schools tend to have lower staff retention rates than the state average.

For governing boards, staff retention should be monitored through regular human resources reports. Boards should review data that distinguishes between mid-year and end-of-year departures and differentiates among school-initiated, voluntary, and unavoidable departures (such as retirement or relocation). Each category provides distinct insight. For example, mid-year turnover or clusters of resignations within the same team may signal deeper issues related to leadership, workload, or school culture. In these situations, leaders often must quickly fill vacancies, sometimes without the benefit of a competitive hiring process. Time spent onboarding and stabilizing new staff can divert attention from instructional improvement and long-term strategic priorities (National Charter School Resource Center, 2021). When boards monitor retention trends proactively, they can engage leadership in strategic conversations before talent instability undermines instructional quality and school culture.

Reasons Staff Leave

The infographic consists of three blue rounded rectangular boxes stacked vertically. Each box contains an icon on the left and text on the right. The first box has a briefcase icon, the second has a wallet icon, and the third has a tropical island icon.

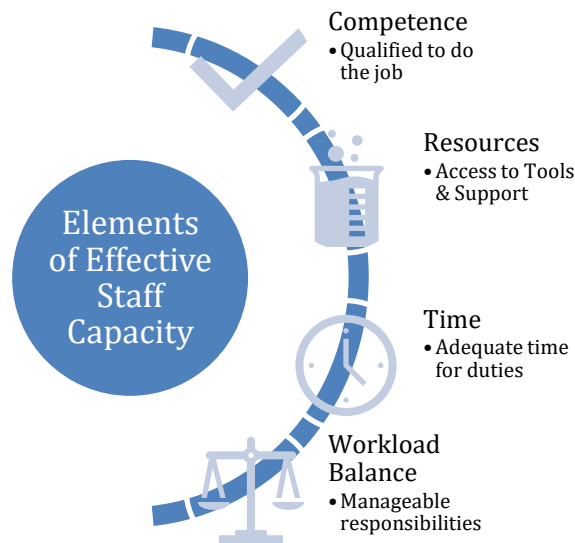
- School Initiated**
 - Non-renewal of contracts
 - Layoffs
- Voluntary**
 - Better pay
 - Workload
 - School culture
- Unavoidable**
 - Retirement
 - Relocation

Staff Capacity

Successful schools ensure that staff have the capacity to fulfill the responsibilities for which they were hired. Staff capacity includes not only individual

competence, but also the time, resources, training, and organizational structures necessary to perform effectively. In charter schools, it is common for one individual to hold multiple roles. While this can increase efficiency and flexibility, it is only sustainable when staff possess the expertise, support, and workload balance required to execute those responsibilities successfully.

National trends underscore the strain many educators experience. According to Edmentum (2025), teachers work an average of 54 hours per week and spend more than 180 hours annually providing feedback to students. Additionally, 79% of public schools report difficulty staffing positions with certified teachers. When vacancies persist or when staff members are consistently required to absorb additional duties, instructional effectiveness and staff culture can suffer.



Strong charter schools use data to align candidates' skills with organizational needs and invest in succession planning and internal talent pipelines, such as paraprofessional-to-teacher programs, to strengthen long-term sustainability (Evan & Canavero, 2020). Rather than reacting to vacancies, these schools intentionally develop the next generation of leaders and instructional staff.

For governing boards, staff capacity can be monitored through regular review of certification rates, years of experience across departments, and vacancy reports. Boards may also audit job descriptions to ensure responsibilities are realistic and aligned to strategic priorities. Additionally, boards should confirm that the budget

supports competitive salaries and benefits and that personnel policies foster a sustainable, high-performing workforce.

Staff Development

Successful schools prioritize ongoing staff development through structured training, data-driven instructional practices, meaningful feedback and coaching, and consistent observation and evaluation systems. Professional learning enables educators to respond to an evolving educational landscape, refine instructional practices, address skill gaps, and effectively integrate innovative technologies (University of San Diego, 2024). Student achievement is higher in schools where professional learning opportunities are connected to a coherent school-wide instructional program and embedded within a coordinated improvement strategy (The Wallace Foundation, 2021).

Staff Development Questions for Governing Boards

What professional development opportunities are available to all staff (teachers, support staff, leadership)?

How does the school ensure these opportunities have meaning and impact?

Is the board’s leader evaluation process rigorous, providing meaningful feedback on areas of growth and areas of success?

For governing boards, staff development can be monitored by reviewing annual professional development calendars, examining personnel policies related to evaluation and coaching, and assessing whether professional learning initiatives are directly tied to measurable school improvement goals. In addition, boards play a critical role in developing, supporting, and retaining the school leader. Research indicates that when boards intentionally support their executive leader, it contributes to stronger retention, improved performance toward strategic goals, and ongoing professional growth (Education Board Partners, 2019). Leaders who feel supported and valued are better positioned to cultivate strong instructional systems and sustain a culture of continuous improvement throughout the organization.

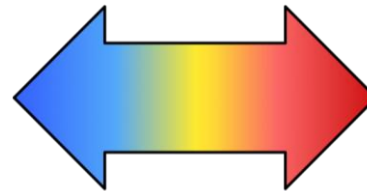
Indicator: Talent

Metric: Staff Retention

Signals of Success

High to Average Staff Retention:

- At or above Colorado's average 77% staff retention rate
- Attrition is primarily due to unavoidable causes



Signals of Struggle

Low Staff Retention:

- Staff retention rate below Colorado's average
- Mid-year departures
- Leadership departures
- Multiple staff departures simultaneously

How to Measure:

- Measure staff retention during the school year and between school years. Delineate school-initiated, voluntary, and unavoidable (retirement/relocation)

Questions to Ask:

- Why are teachers leaving?
- Why are teachers staying?
- What initiatives can the board take to assist with staff retention?
- Does the school have a staff retention plan?

Actions to Take:

- Complete a staff survey to gauge staff satisfaction.
- Reexamine salary structures and total compensation.
- Form a committee to work with the school leader to complete a staff recruitment and retention plan internally or with a third party. (See Talent Resource 1: Staff Recruitment and Retention Plan)

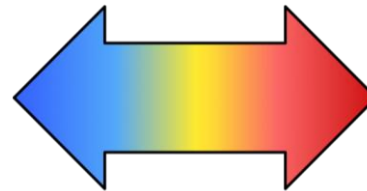
Indicator: Talent

Metric: Staff Capacity

Signals of Success

Responsive Staffing:

- All staff have job descriptions that reflect high-impact and realistic responsibilities.
- Staff are certified or have experience in their positions.
- Staffing matches student and school needs.



Signals of Struggle

Reactive Staffing:

- Staff are expected to fulfill multiple roles without adequate training or support.
- Staff are asked to teach or work in positions where they lack experience or certification.
- Key personnel to meet student and school needs are lacking.

How to Measure:

- Measure staff capacity by assessing the number of staff certified in their role or the amount of experience across departments. Staff capacity can also be assessed through a job description audit.

Questions to Ask:

- How are staff members' skills and competencies matched to the needs of students and the school?
- Does the school have the necessary staff to fulfill its mission?

Actions to Take:

- Ensure that the school's budget can support hiring high-quality staff.
- Work with school leadership to develop realistic job descriptions for every role.
- Review personnel policies related to staff qualifications and hiring.

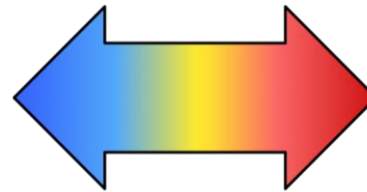
Indicator: Talent

Metric: Staff Development

Signals of Success

Meaningful Staff Development:

- Staff are regularly and comprehensively evaluated.
- Staff are engaged in ongoing PD to meet their needs and the needs of students.
- Staff participates in job-embedded learning (i.e., coaching, mentoring, peer observation).
- The board conducts a rigorous leadership evaluation process annually.



Signals of Struggle

Insufficient Staff Development:

- Staff are only evaluated once a year or not at all.
- Staff do not receive PD, or the PD topics are irrelevant to the needs of students and staff.
- Staff do not participate in job-embedded learning.
- The board does not regularly evaluate the school leader, or the process for evaluation is not rigorous.

How to Measure:

- Measure staff development by reviewing year-long professional development calendars, personnel policies related to staff evaluations (including the board's process for evaluating the school leader), and progress of professional development related to school improvement goals.

Questions to Ask:

- What professional development opportunities are available to all staff (teachers, support staff, leadership)?
- How does the school ensure these opportunities have meaning and impact?
- Is the board's leader evaluation process rigorous, providing meaningful feedback on areas of growth and areas of success?

Actions to Take:

- Create a rigorous leadership evaluation process. If the board does not have the capacity or expertise to evaluate the school's leader, hire an external consultant. (See Talent Resource 2: Leader Evaluation Timeline)
- Ensure the school's budget allocates enough resources for developing the school's teachers and leaders.
- Review personnel policies related to evaluation and professional development.

Talent Resource 1: Staff Recruitment and Retention Plan

A Staff Retention Plan is a strategic framework to help organizations retain high-quality employees. Its primary purposes are reducing turnover, enhancing job satisfaction, fostering professional growth, and strengthening organizational culture. Use the guiding questions to reflect on your school’s retention and recruitment practices.

Overview of the Charter School’s Mission and Values:		
3-Year Staff Retention Data:		
Major themes from staff surveys and exit interviews:		
Areas of celebration:		
Areas of growth:		
Staff Retention Goal(s):		
Staff Recruitment Goal(s):		

Reflection Questions

Recruitment and Hiring:
How will the school attract mission-aligned candidates? Why is your school an excellent place to work? What onboarding and mentorship opportunities are available to new staff?
Professional Development and Career Growth:
What training opportunities are available to staff internally and externally? What mentorship and coaching are offered? What does evaluation and feedback look like? What are the pathways to career advancement?

School Culture and Work Environment:

Define your school’s culture. How are staff appreciated and recognized? How are staff involved in decision-making processes? What leadership opportunities do staff have? How do staff provide feedback to leaders?

Compensation and Benefits:

Define your compensation and benefits package. What is your PTO policy, retirement plan, incentives, or other factors differentiating your school’s total compensation? Do you offer a wellness program or other work-life balance initiatives?

Action Plan

SMART Goal (Specific, Measurable, Achievable, Realistic, and Timely):

Describe the discrete steps you will take to meet your goal.

Action Step	Description	Person(s) Responsible	Target Date

What evidence will be used to determine if the goal is met? (Baseline data and expected outcomes)

Progress Updates:

Date:	Progress Update:	Next Steps or Shifts in Plan:

SMART Goal (Specific, Measurable, Achievable, Realistic, and Timely):	
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Describe the discrete steps you will take to meet your goal.

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What evidence will be used to determine if the goal is met? (Baseline data and expected outcomes)
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Progress Updates:

Date:	Progress Update:	Next Steps or Shifts in Plan:

Talent Resource 2: Leader Evaluation Timeline

Timeline	Action Steps
<p>Summer/Prior to Start of School</p> <p>Set Performance Goals</p>	<ol style="list-style-type: none"> 1. Board holds Annual Summer Retreat/Strategic Planning Session 2. School leader develops goals against strategic plan focus areas and job description and submits to the Board President 3. Board reviews and approves performance plan 4. Board President communicates any changes and approval of plan 5. School leader development is planned/agreed upon 6. The Board decides if an external evaluator is needed
<p>January</p> <p>Evaluation & assess and re-assign goals if needed</p>	<ol style="list-style-type: none"> 1. School leader writes Self-Assessment against pre-set goals 2. Board reviews, gives performance feedback, and approves any changes to the initial goals in writing 3. The Board President completes and delivers the performance evaluation to the ED <ol style="list-style-type: none"> a. Data to inform evaluation may include <ol style="list-style-type: none"> i. Staff Surveys ii. Parent Surveys iii. Interviews with direct reports iv. School Performance Results (MAPS, CMAS, DIBELS) 4. The completed evaluation is presented to the Board in Executive Session. The President makes a recommendation to retain or not retail the ED for the upcoming year. The Board votes on contract renewal. 5. Check-in on school leader development plan progress 6. Board President presents new school leader contract for the upcoming year
<p>Late Spring</p> <p>Review goals and Goal Setting review</p>	<ol style="list-style-type: none"> 1. School leader writes year-end self-assessment 2. Board reviews and gives performance feedback <ol style="list-style-type: none"> a. Data to inform review may include <ol style="list-style-type: none"> i. Staff Surveys ii. Parent Surveys iii. Interviews with direct reports iv. School Performance Results (MAPS, CMAS, DIBELS) 3. Board President provides collective feedback, discussion and review of professional development plan
<p>Ongoing Continuous Feedback</p>	<ol style="list-style-type: none"> 1. Regular monthly meetings with the Board President and Executive Director 2. Dashboard report-outs on monitoring of critical data 3. Executive Director Reports 4. Opportunity for positive reinforcement on good results and/or course-correct throughout the year

Indicator: Culture

Introduction

A strong culture, both internally among staff and students and externally within the broader community, is essential to a school’s long-term sustainability. Research consistently identifies organizational culture as one of the strongest predictors of overall effectiveness and performance outcomes (Aten, 2020). In schools, culture shapes how decisions are made, how conflicts are resolved, how adults collaborate, and ultimately how students experience learning.

School culture is formed through the daily interactions of stakeholders and the explicit and implicit messages communicated throughout the organization. According to Shafer (2018), “beliefs, values, and actions will spread the farthest and be tightly reinforced when everyone is communicating with everyone else” (para. 5). Culture is not defined solely by mission statements or posted values, it is embedded in consistent behaviors, shared expectations, and reinforced norms. Five critical elements help shape organizational culture:

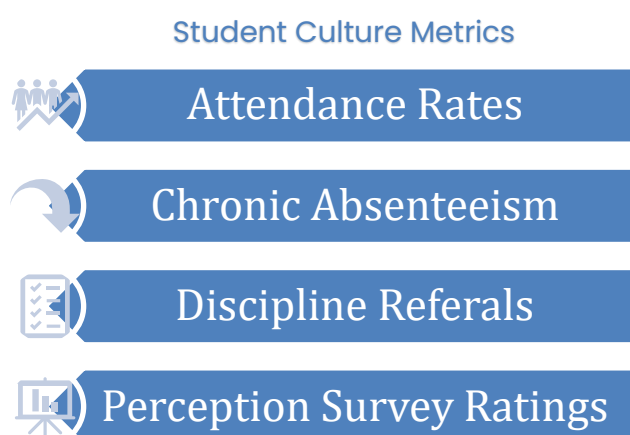
- Beliefs and assumptions
- Shared values
- Norms
- Patterns and behaviors
- Tangible evidence

These elements interact continuously. When beliefs align with shared values, when norms reinforce desired behaviors, and when tangible evidence (such as policies, rituals, and traditions) reflects stated priorities, a coherent and positive culture emerges. When every member of the school community reinforces the connections among these elements, the result is a strong, sustainable culture that supports students, staff, and families.

Indicator	Metrics
Culture	<ul style="list-style-type: none">● Student culture● Staff culture● Community Culture

Student Culture

A positive student culture is evident when students feel safe, supported, and meaningfully connected to their school community. “A positive internal school culture ensures that schools are safe and supportive places for students to learn” (National Charter School Resource Center, 2021, p. 10). In strong schools, expectations for engagement and behavior are clearly defined, consistently reinforced, and understood by both students and staff. Students demonstrate a sense of belonging and investment in their learning environment. Student culture can greatly influence both academic outcomes and long-term enrollment stability.

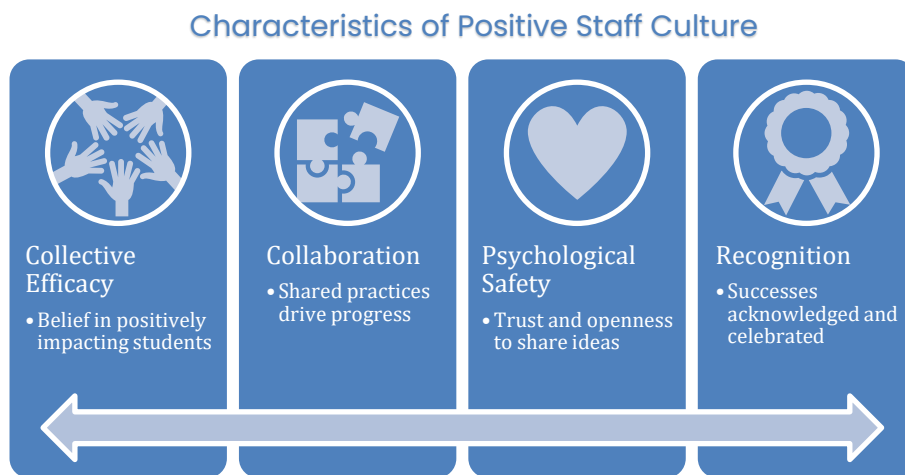


For governing boards, student culture should be monitored through consistent, objective data. Key metrics may include monthly attendance rates, chronic absenteeism percentages, discipline referrals, suspension and expulsion data, and trends across student subgroups. These data points should be reviewed not only in isolation but over time to identify patterns. Boards should also examine student perception data gathered through surveys measuring safety, belonging, engagement, and well-being. Increases in disciplinary incidents or declines in attendance may signal deeper issues related to instructional engagement, school climate, or leadership effectiveness. Stable or improving data can validate that schoolwide expectations and behavior systems are functioning effectively. Effective boards ensure that policies related to safety and conduct are periodically reviewed. By monitoring these indicators, governing boards reinforce the importance of a positive student culture as foundational to both academic success and long-term sustainability.

Staff Culture

A healthy staff culture is foundational to instructional quality and long-term school sustainability. In strong schools, staff demonstrate collective teacher efficacy, or a teacher's belief in positively affecting students. According to work by John Hattie, collective efficacy has a mean effect size of 1.57, thus highly influencing student achievement. In Hattie's framework, an effect size of 0.40 represents the average effect of an educational intervention. An effect size of 0.70 or higher indicates a significant educational influence. Collective efficacy has nearly four times the impact of an average educational intervention (Hattie, 2021). Positive staff culture is also characterized by collaboration, mutual respect, and psychological safety. Teachers feel supported rather than isolated, successes are celebrated, and communication is clear and consistent across teams.

For governing boards, staff culture must be monitored at a systems level rather than through individual personnel matters. Boards can assess culture by reviewing staff retention trends. Employee engagement surveys provide additional insight, particularly questions related to trust in leadership, collaboration, morale, recognition, and sense of efficacy. Exit interview themes can reveal recurring concerns that may not surface otherwise. By monitoring staff culture intentionally, governing boards help ensure that the adult culture of the school remains strong enough to support student success and long-term sustainability.



Community Culture

Community culture reflects the strength of the relationships between the school, families, and the broader community, including community partners, state entities, and the school’s authorizer. In schools with a positive community culture, families are viewed as true partners in student success. Research indicates that successful schools engage families in ways that build trust, overcome language and cultural barriers, increase both the quality and frequency of school-family interactions, and equip families with practical strategies to support learning at home (Evan & Canavero, 2020). Community culture also extends beyond family engagement. Strong charter schools intentionally cultivate mutually beneficial partnerships with community organizations and maintain proactive and transparent relationships with state agencies and the school’s authorizer. These relationships are grounded in a shared commitment to student outcomes.

For governing boards, community culture can be measured through both perception and participation data. Family survey results provide insight into trust, satisfaction, and communication effectiveness. Reenrollment rates and monthly enrollment trends may serve as indicators of parent satisfaction. Boards may also review participation rates in events such as parent-teacher conferences, family celebrations, and community forums. They can additionally assess the strength and consistency of partnerships with community organizations, state entities, and the school’s authorizer. By monitoring these indicators proactively, governing boards reinforce transparency, strengthen stakeholder trust, and support the school’s long-term sustainability.

Community Culture Questions for Governing Boards

How does the school engage families and other community members?

What communication structures support families and the community?

How does the school solicit feedback from the community? What does the school do with the feedback received?

How does the school address negative family and community perceptions about the school?

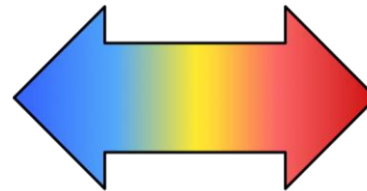
Indicator: Culture

Metric: Student Culture

Signals of Success

Positive Student Culture:

- Students feel safe, supported, and engaged in the school community.
- Expectations for student engagement and behavior are clearly defined.
- Student behavior infractions and disciplinary actions are stable or decreasing.
- Student attendance is stable and high.
- Behavior management policies and procedures are clearly communicated and consistently followed.



Signals of Struggle

Negative Student Culture:

- Students feel threatened, excluded, or discouraged.
- Student engagement and behavior expectations are low or are unclear.
- Student behavior infractions and disciplinary actions are sharply increasing.
- Student attendance is declining.
- Behavior management policies and procedures do not exist, are unclear, and/or are not followed.

How to Measure:

- Measure student attendance, student discipline infractions, and student sense of safety/well-being/belonging through surveys.

Questions to Ask:

- How are student engagement and behavior expectations communicated to students and staff?
- How does the school solicit feedback from students? What does the school do with the feedback received?
- What are the school's behavior management and attendance policies? Are they being followed?

Actions to Take:

- Monitor student behavior, discipline, and attendance monthly as part of the leader's board report.
- Review student policies related to safety, behavior management, and attendance.
- Highlight student accomplishments during board meetings. (See Culture Resource 1: Student and Staff Recognition)
- Seek feedback from students through surveys, needs assessments, and focus groups.
- Share and act on feedback by setting strategic goals around culture.

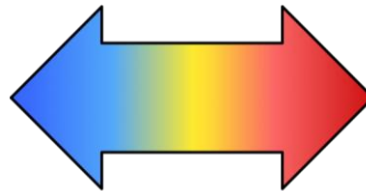
Indicator: Culture

Metric: Staff Culture

Signals of Success

Positive Staff Culture:

- The existence of collective teacher efficacy – the belief that teachers will positively impact students.
- A welcoming and supportive environment characterized by collaboration and respect.
- Staff successes are celebrated.
- Clear and consistent communication exists among staff.



Signals of Struggle

Negative Staff Culture:

- Teachers have “given up” or are acting out of fear to produce student results.
- Isolated, divided, or fear-based staff culture.
- Staff are unrecognized or unappreciated.
- A lack of communication structures creates confusion and distrust.

How to Measure:

- Measure staff culture through staff retention trends, employee survey results especially related to trust/collaboration/moral/recognition/sense of efficacy, and exit interview themes.

Questions to Ask:

- What structures exist to support collaboration and shared problem-solving among teachers?
- How is staff feedback gathered, and what changes have been made as a result of that feedback?
- What themes are emerging from exit interviews or retention data?
- How are staff successes recognized and celebrated throughout the year?

Actions to Take:

- Monitor staff retention as part of the leader’s board report.
- Review staff policies.
- Highlight staff accomplishments during board meetings. (See Culture Resource 1: Student and Staff Recognition)
- Seek feedback from staff through surveys, needs assessments, and focus groups.
- Share and act on feedback by setting strategic goals around culture.

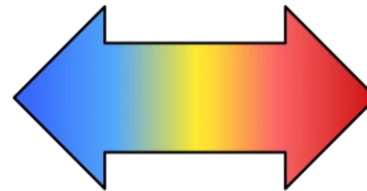
Indicator: Culture

Metric: Community Culture

Signals of Success

Positive Community Culture:

- Intentionally builds family and community relationships.
- Encourages family and community involvement in the school. Families are seen as partners.
- Clear and consistent communication exists between the school and families and the school and the community.



Signals of Struggle

Negative Community Culture:

- Weak family and community relationships.
- Shutting out family and community involvement.
- Lack of communication structures or intentionally keeping information from families and the community.

How to Measure:

- Measure community culture through family survey data, reenrollment rates, participation rates in events like parent/teacher conferences or community celebrations. Assess the number and quality of community partnerships and the strength of the authorizer relationship.

Questions to Ask:

- How does the school engage families and other community members?
- What communication structures support families and the community?
- How does the school solicit feedback from the community? What does the school do with the feedback received?
- How does the school address negative family and community perceptions about the school?

Actions to Take:

- Monitor changes in enrollment monthly as a measure of parent satisfaction.
- Provide regular board communication updates to the community about initiatives, changes, and school needs. (Culture Resource 2: Sample Board/Community Communication)
- Seek feedback from families through surveys, needs assessments, and focus groups. Share and act on feedback by setting strategic goals around family engagement.
- Provide budgetary resources for family and community engagement.
- Review community relations policies.

Culture Resource 1: Student and Staff Recognition Template

Add Staff/Student recognition as a standing agenda item.

Use this template to gather nominations.

Student Nomination:

Student Name(s):	Grade Level:	Nominated by:

Area of Recognition:

- Academic Achievement Growth & Improvement
- Character / Citizenship Leadership
- Attendance Community Service

Description of Accomplishment: (What did the student achieve? How does this reflect the school's mission or core values? What impact did this have on peers or the school community?)

Staff Nomination:

Staff Name(s):	Role/Department:	Nominated by:

Area of Recognition:

- Instructional Excellence Student Relationship Building
- Innovation Leadership
- Collaboration Operational Excellence

Description of Accomplishment: (What specific actions or outcomes are being recognized? How did this impact students, staff, or community? How does this align with strategic goals?)

Culture Resource 2: Sample Board/Community Communication

August Board Update

The School Board of Directors held its first meeting of the year on August 27. The board welcomed new members and assigned officer roles. We invite you to visit the school's website to learn more about your volunteer board members. Throughout the year, board members will wear name tags when present at school events to make it easy to connect.

The leader presented the Director's Report, highlighting summer accomplishments and the strong start to the school year, including new hires, construction updates, and stakeholder survey results. The board looks forward to partnering closely with the leader to advance strategic plan goals and continue strengthening the school's impact in the community.

Call for a Board Member

The Board of Directors is currently seeking to fill a one-year board vacancy. We are looking for a parent or community member passionate about the long-term sustainability of the school. Experience in law, finance, technology, facilities, data analysis, strategic planning, human resources, or education is particularly valuable. Board members attend one monthly meeting and serve on one committee (approximately 4–6 volunteer hours per month). Interested applicants may apply using the posted application form.

September Board Update

Family & Staff Participation Opportunity

One of the board's primary objectives is bringing the school's strategic plan to life. To support this work, advisory committees have been established, and families and staff are invited to participate.

Committees include:

- Finance

- School Accountability
- Technology
- Facilities
- Governance

Each committee supports key priorities such as budget oversight, student achievement, technology planning, facilities planning, governance best practices, and long-term visioning. Interested families and staff are encouraged to complete the posted interest form.

Thank you for partnering with us to strengthen our school community.

October Board Update

The Board of Directors held its monthly meeting on October 29. The leader's report included an update on enrollment, which met the school's budgeted target. The board also reviewed the school's Unified Improvement Plan (UIP), focused on increasing student growth in math and ELA through strengthened instructional systems, curriculum alignment, and collaborative teacher planning structures.

A Note on Enrollment

While we celebrate meeting our enrollment target, the school has additional capacity. When seats are filled, the school is better positioned to expand programs, provide additional supports, and invest in strategic priorities. Public schools are funded primarily through Per-Pupil Revenue (PPR), meaning enrollment stability directly supports programming and sustainability.

Families can support recruitment by:

- Sharing positive experiences with friends and neighbors
- Posting reviews on school information websites
- Promoting upcoming information nights

Student retention remains equally important. Long-term enrollment strengthens student outcomes and school stability.

Indicator: Instruction

Introduction

Charter schools are granted significant autonomy in designing their instructional programs. With that autonomy comes the responsibility to ensure that every student, regardless of grade level, language proficiency, or disability status, masters rigorous academic standards. Instructional freedom should enable schools to design coherent systems that accelerate learning for all students.

According to Evan and Canavero (2020), “Coherence among curriculum, instruction, and assessment, as well as their alignment with college- and career-ready academic standards, are essential for high-quality teaching and learning, regardless of a school’s curricular focus or school type” (p. 24). High-quality schools prioritize aligned, standards-based curriculum and ensure that daily instructional practices and assessments reinforce that alignment (CAO Central, 2021). Instruction is not left to individual preference. It is guided by a shared vision, common expectations, and clearly articulated instructional frameworks.

Strong instructional systems also include robust supports for both teachers and students. Professional development, structured feedback cycles, and data-informed instructional practices help educators continuously refine their craft. At the same time, effective schools implement comprehensive student support systems, including Multi-Tiered Systems of Support (MTSS), English language development programs, special education services, and social-emotional supports. Together, these elements create an instructional program that is designed to meet the needs of every learner.

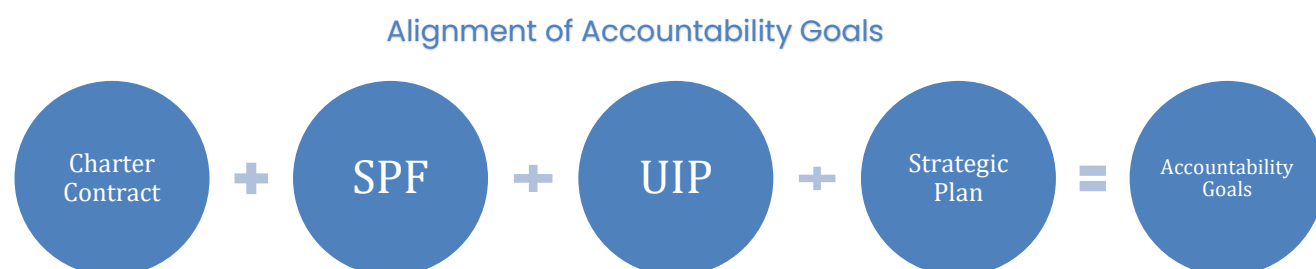
Indicator	Metrics
Instruction	<ul style="list-style-type: none">● Academic progress● Quality resources● Systems of support

Academic Progress

Effective charter schools establish measurable strategic goals for student achievement and growth. These goals should be grounded in and aligned to several essential accountability documents:

- The school’s contract with its authorizer
- The Colorado School Performance Framework (SPF)
- The Unified Improvement Plan (UIP)
- Strategic Plan’s mission-specific goals

When board members understand how these documents intersect, they are better equipped to provide meaningful oversight rather than surface-level review (Colorado League of Charter Schools, 2025). The authorizer contract establishes performance expectations, the SPF reflects state accountability measures, the UIP outlines annual improvement strategies, and mission-specific goals ensure the school remains true to its unique design.



To provide effective academic oversight, board members must understand Colorado’s Accountability Model, including the three key performance indicators used to evaluate and accredit all public schools and districts:

- *Academic Achievement* – Average scores on state assessments
- *Academic Growth* – Progress students, or groups of students, make in their achievement on assessments from one year to the next
- *Postsecondary and Workforce Readiness* (high school only) – based on several data points (i.e. graduation rates, dropout rates, average SAT scores, and matriculation rates) which represent how well schools are preparing students for college and the workforce

These indicators form the foundation of the SPF. In addition to rating all students, the SPF provides ratings for the following subgroups of students:

- *Free/Reduced-Price Lunch Eligible* – Includes students who meet the federal eligibility criteria for free and reduced-price lunch
- *Minority Students* – Includes students identifying as American Indian/Alaska Native, Asian, Black/African American, Native Hawaiian/Other Pacific Islander, or Hispanic/Latino
- *Multilingual Learners* – Includes students who are linguistically diverse and require language support to access grade-level content in English
- *Students with Disabilities* – Includes only students with Individualized Education Plans (IEPs)

Schools receive a rating of Performance, Improvement, Priority Improvement, or Turnaround based on how these indicators are weighted and combined (Colorado Department of Education, 2025b).

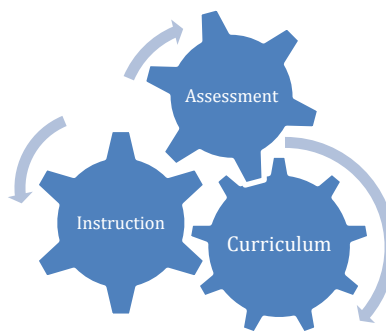
In addition to state-required assessments, most schools administer local measures to monitor progress more frequently. These typically include a combination of summative assessments (e.g., SAT, end-of-unit exams), interim assessments (e.g., NWEA MAP, DIBELS), and formative assessments (e.g., quizzes, classroom assignments). While day-to-day instructional decisions belong to school leadership, boards benefit from understanding how these assessments provide early indicators of progress toward annual goals.

For governing boards, monitoring academic progress requires establishing consistent systems for reviewing data at the governance level. Boards should utilize a comprehensive academic dashboard that includes both state and local assessment results, growth trends over time, subgroup performance data, and progress toward UIP goals. Rather than reviewing isolated test scores, boards should focus on trends and alignment to strategic targets. Quarterly updates from the leader on UIP milestones and improvement strategies allow the board to assess whether planned actions are being implemented and producing intended outcomes. Many boards designate specific months to review interim assessment results so that discussions are predictable and data-informed. By creating structured opportunities to examine academic performance and monitor progress toward goals, governing boards move from passive recipients of information to active stewards of student achievement.

Quality Resources

High-quality instructional resources are foundational to strong academic outcomes. A unified, standards-aligned curriculum ensures that students experience coherence across grade levels and subject areas, preventing gaps and redundancies in learning. In strong schools, assessments are intentionally selected and balanced, with a clear purpose for each. When curriculum, instruction, and assessment are aligned, teachers are better positioned to deliver rigorous content consistently.

Aligned Resources Improve Learning



The landmark 2018 report *The Opportunity Myth* by TNTP found that the resources students have access to are strongly correlated with the quality of their academic experience. The study identified four key resources that contribute to stronger academic outcomes:

- Grade-appropriate assignments
- Strong instruction
- Deep engagement
- High expectations

When these elements work together, they significantly increase the likelihood that students will master standards and develop the skills necessary for success (TNTP, 2018).

For governing boards, quality resources can be measured by reviewing curriculum and assessment systems. While boards do not select daily lesson materials, they are responsible for establishing policies and structures that safeguard instructional coherence. Boards can confirm the existence of a curriculum adoption policy that includes a rigorous vetting process for new materials and regular evaluation cycles for existing resources. Boards should also verify that budget allocations support the replacement and updating of instructional materials

as needed. Importantly, boards should regularly review assessment results to ensure that resources are producing intended outcomes. By monitoring quality curriculum and assessments, governing boards help ensure that resources support continuous academic growth for all students.

Systems of Support

Effective instructional programs include comprehensive systems of support designed to meet the diverse needs of all students. Even in schools with strong core instruction, some students require additional academic, language, or social-emotional support to reach grade-level expectations. High-quality schools implement structured systems, often referred to as Multi-Tiered Systems of Support (MTSS), that provide varying levels of intervention based on student needs. These systems may include targeted academic interventions, English language development services, special education supports, and programs that address students’ social and emotional well-being. When functioning effectively, systems of support allow schools to identify struggling students early, provide targeted assistance, and monitor progress over time to ensure students move toward mastery (PowerSchool, 2025).



For governing boards, oversight of systems of support focuses on ensuring that these structures exist, are adequately resourced, and are producing results. Boards can monitor the effectiveness of support systems by reviewing progress monitoring data, trends in subgroup performance, and reports on the number of students receiving Tier 2 or Tier 3 interventions. While boards do not manage individual student interventions, they should ensure that the school has clearly defined systems for identifying and supporting struggling students. Regular reports from school leadership, combined with review of academic dashboards and subgroup performance data, help boards determine whether support systems are successfully helping students close learning gaps and make progress toward academic goals.

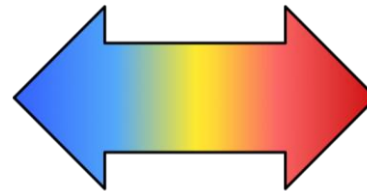
Indicator: Instruction

Metric: Academic Progress

Signals of Success

Progress Towards Academic Goals:

- Outcomes are consistently high across the school in growth and achievement.
- Students are making progress across subgroups (i.e., ELL, students of color, FRL).
- Students are engaged in their learning.



Signals of Struggle

Lack of Progress Towards Academic Goals:

- Outcomes are inconsistent across the school.
- Students are not making progress across subgroups.
- Students are not engaged in their learning.

How to Measure:

- Measure academic progress through a comprehensive data dashboard that includes state accountability data (SPF indicators), interim assessment results, subgroup performance trends, and progress toward Unified Improvement Plan (UIP) goals.

Questions to Ask:

- How is progress toward our UIP and mission-specific academic goals trending this year?
- What patterns do we see in achievement and growth across student subgroups?
- How do our results compare to similar schools and state averages?
- What instructional strategies are driving areas of success?

Actions to Take:

- Monitor academic dashboards quarterly, with designated months for reviewing interim data.
- Request regular updates on UIP milestones and improvement strategies. (See Instruction Resource 1: Unified Improvement Plan Progress Tracker)
- Ensure subgroup performance is reviewed alongside overall school data.
- Set clear, measurable academic goals aligned to the authorizer contract and SPF indicators.
- Align strategic planning, budgeting, and professional development priorities to identified academic needs.

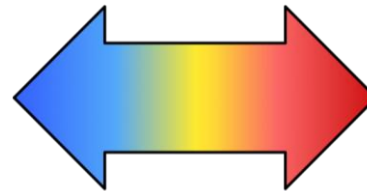
Indicator: Instruction

Metric: Quality Resources

Signals of Success

High Quality Curriculum & Assessments:

- A unified curriculum is used across grades and subjects.
- A variety of assessments are used to inform instruction.
- Systems are in place (i.e., PLCs or data teams) that require teachers to use data.



Signals of Struggle

Inconsistent Curriculum and Assessments:

- Lack of a unified curriculum.
- Too many or too few assessments are used. Staff do not use, or do not know how to use, the data to inform instruction.
- The school lacks data systems.

How to Measure:

- Measure quality resources by reviewing curriculum and assessment matrices, data structures that are in place, and budget allocations to support a regular curriculum review/replacement cycle.

Questions to Ask:

- Does the board have a curriculum adoption policy that includes a rigorous vetting process to ensure resources selected are high-quality?
- Does the board budget for the replacement of curricular resources?
- How is the school using assessment data to inform instruction?
- What systems are in place to support data analysis?

Actions to Take:

- Create an assessment matrix that details assessments used, their frequency, and their purposes.
- Create a curriculum matrix that shows alignment of resources. (See Instruction Resource 2: Curriculum and Assessment Matrix)
- Adopt a curriculum policy that ensures curriculum resources are regularly evaluated and that new resources undergo rigorous vetting.
- Budget for curricular replacement, as needed.

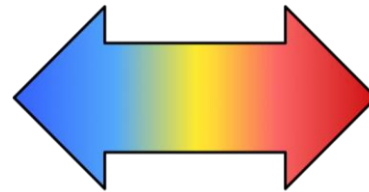
Indicator: Instruction

Metric: Systems of Support

Signals of Success

Continuum of Supports for Students:

- A continuum of supports exists for students with varied needs (i.e., intervention, MTSS, SPED, ELL, GT, social-emotional).
- The school makes system changes when needed to support students (i.e., scheduling, staffing, remedial courses, tutoring).
- Staff have high and clear expectations for all students.



Signals of Struggle

Lack of Supports for Students:

- Support for students with varied needs is lacking, and students continue to fall further behind.
- The school maintains the same systems and hopes for different results.
- Staff have high expectations for some students, or expectations are low or unclear.

How to Measure:

- Measure systems of support by reviewing subgroup data as evidence that programs are closing learning gaps successfully. Boards can examine the programs available such as MTSS, special education services, English language development programs, social-emotional support, and gifted and talented programs.

Questions to Ask:

- What systems are in place to identify students who need additional academic, language, or social-emotional support?
- How does the school monitor the effectiveness of interventions and supports?
- Are student subgroups (ELL, students with disabilities, FRL, etc.) making progress over time?
- What adjustments are made when interventions are not producing the desired results?

Actions to Take:

- Monitor academic progress of key student subgroups as part of the board's academic dashboard.
- Review policies and procedures related to special education, English language development, and student support services.
- Ensure adequate staffing and budget resources are allocated to intervention programs and student services.

Instruction Resource 1: Unified Improvement Plan Progress Tracker

At the beginning of the year, fill in all Major Improvement Strategies, SMART goals, and Action Steps. Decide on quarterly progress monitoring dates. Update progress notes and next steps at each progress monitoring date to ensure the school is on track to meet goals, and if not, can make mid-year adjustments.

Quarter 1 Monitoring Date 1:

Quarter 2 Monitoring Date 2:

Quarter 3 Monitoring Date 3:

Quarter 4 Monitoring Date 4:

Major Improvement Strategy #1	
School Year SMART Goal:	

Action Step	Progress	Next Step

Major Improvement Strategy #2	
School Year SMART Goal:	

Action Step	Progress	Next Step

Major Improvement Strategy #3	
School Year SMART Goal:	

Action Step	Progress	Next Step

Instruction Resource 2: Curriculum and Assessment Matrix

Assessment Matrix				
Assessment	Required by the State or Authorizer?	Purpose	Grades Administered To	Administration Dates

Curriculum Matrix				
Subject	Program Name	Grades Served	Adoption Date	Review Date (Approx. every 4 years)
Reading				
Foundational Reading Skills				
Writing				
Mathematics				
Social Studies				
Science				
English Language Development				
Special Education				
Interventions				
Social-Emotional Learning				
Other				

Dashboards: Your Monitoring Tool

A dashboard is a high-level overview of data aligned to key indicators. As defined by Irvin and Piccirillo-Stosser (2025), a dashboard is “an essential tool for boards and school leaders to track key metrics across a school’s identity, academics, student culture, talent, leadership, engagement, governance, operations, and finance” (para. 14). Some tools align actual performance to goals, with color-coded stoplight visuals reflecting progress. Others are organized around the strategic priorities of the board and the set of measures that indicate success. Metrics on a dashboard are updated at various intervals depending on when data is available. For example, enrollment data is available monthly, whereas interim assessment data is available in the fall, winter, and spring. The table below includes sample metrics aligned with each domain.

A dashboard alone will not support school success. Instead, the metrics on a dashboard are evidence of the systems that exist within a school. It is the system that ensures clarity and intentionality in school operations (National Charter School Resource Center, 2021). Based on the school’s mission, goals, board’s strategic plan, and authorizer agreement, the board should determine the metrics that will be monitored. The board creates the dashboard, but the school leader is usually responsible for inputting and reporting on data (Ksenyak & Larbi-Cherif, 2022). Through this board-leader relationship, the quality of the school’s leadership, governance, finance and operations, talent, culture, and instruction can be accurately monitored.

Being presented with the data is only the first step, however. Board members may be unable to interpret or act on data presented because they lack the skills or experience in a particular field. By understanding how to interpret the data, key questions to ask, and potential actions to take, dashboards become powerful tools for tracking the success and viability of a charter school. When boards encounter inadequate progress or off-track patterns, they can flag concerns right away (Irvin & Piccirillo-Stosser, 2025).

Dashboard Indicators and Sample Metrics

Indicator	Metrics
Leadership	<ul style="list-style-type: none"> ● Organization chart ● Progress toward implementing improvement initiatives ● Major leadership responsibilities (including annual projects) and identified leads
Governing Board	<ul style="list-style-type: none"> ● Number of board members ● Number of board vacancies ● Skill set matrix ● Length of board meetings
Finance and Operations	<ul style="list-style-type: none"> ● Facility costs ● Estimated facility improvement expenditures (5-year projections) ● Student enrollment trends ● Reasons for student attrition ● Wait lists by grade level ● Year to Date (YTD) Revenue ● YTD Expense/Income/Cash on hand by number of days
Talent	<ul style="list-style-type: none"> ● Staff Retention rate ● Number of staff vacancies ● Reasons for staff attrition ● Staff diversity statistics ● Professional development completed by staff ● Number of observations completed by leadership

<p>Culture</p>	<ul style="list-style-type: none"> ● Student discipline rates (referrals, suspensions, expulsions) ● Number of behavior plans ● Student attendance rate ● Number of attendance plans ● Student demographics ● Stakeholder survey data ● Parent volunteer hours ● Student participation in clubs/activities
<p>Instruction</p>	<ul style="list-style-type: none"> ● State Ranking ● State Test Scores ● Interim Test Scores ● % students on track with credits ● % students admitted to 4-year college ● % students passing courses

Note. Sources: Bellwether (2025); Colorado League of Charter Schools (2025).

Dashboard Resource 1: Sample Data Dashboard 1

Period: -----

Key School Demographics

Student Enrollment	#	Staffing	#	Parent Engagement	%
Male		FTE Teachers		Home Visits	
Female		Administrators		Orientation	
Free/Reduced Lunch		Other Staff		Teacher Conference	
SPED		Total Staff		School Event	
ELL		Student Ratio		Satisfied / Survey	

Student Recruitment

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Letter of Intent										
Completed Applications										
Confirmed Returning										
Total Completed / Confirmed										
Target Number										
# Wait List (+) / Below Target (-)										

Enrollment and Attendance – Grade K

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
% Attendance										

Enrollment and Attendance – Grade 1

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
% Attendance										

Attrition Rate: Staff

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Reasons for Leaving 1) Dismissed 2) Grad School 3) Move 4) Other										
Total Staff										

Attrition Rate: Students

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Reasons for Leaving 1) Too hard 2) Too strict 3) Move 4) Other										
Total Enrollment										

State Assessment – ELA

Month	% Below Basic	% Basic	% Proficient	% Advanced	Total % Passing

State Assessment – Math

Month	% Below Basic	% Basic	% Proficient	% Advanced	Total % Passing

Culture Indicators

Indicator	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
HW Completion %										
Tutoring / Sat School %										
Suspension										
Expulsion										

Dashboard Resource 2: Sample Data Dashboard 2

State School Performance Framework Data				
YEAR	2022	2023	2024	2025
OVERALL RATING				
EL Math Achievement				
EL Math Growth				
MS Math Achievement				
MS Math Growth				
EL ELA Achievement				
EL ELA Growth				
MS ELA Achievement				
MS ELA Growth				
EL Science Achievement				
MS Science Achievement				

Student Formal Discipline Data				
YEAR	2022-23	2023-24	2024-25	2025-26
Total Discipline Incidents				
In-School Suspensions				
Suspensions				
Referral to Law Enforcement				
Total Number of Students				

Staff Retention Data			
Spring 23 to Fall 23 (Year-to-Year)	Fall 23 to Spring 24 (mid-year)	Spring 24 to Fall 24 (Year-to-Year)	Fall 24 to Spring 25 (mid-year)

Staff Departure/Vacancy Data												
	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	April	May	June	July
Staff Departures												
Staff Vacancies												

Total October Count Enrollment by Year			
2022/2023	2023/2024	2024/2025	2025/2026

Monthly Enrollment by Grade Level												
	Spaces Allocated	Aug	Sept	Oct (unofficial count)	Oct (official count)	Jan	Feb	March	April	May	June	July
Kinder												
1st Grade												
2nd Grade												
3rd Grade												
4th												

Grade												
5th Grade												
6th Grade												
7th Grade												
8th Grade												
TOTAL												

Round 1 Lottery Projections						
	Not Returning	Confirmed Returning AND Applied to a Different School	Returning: includes confirmed, action taken & applied elsewhere	Round 1 Applications Received	NEW Students	Total Anticipated Students
Kinder						
1st Grade						
2nd Grade						
3rd Grade						
4th Grade						
5th Grade						
6th Grade						
7th Grade						
8th Grade						
TOTAL						

Conclusion

Strong charter schools do not happen by chance. They are the result of intentional leadership, clear governance structures, and a shared commitment to continuous improvement. Governing boards play a critical role in creating the conditions that allow schools to thrive. While boards do not manage the day-to-day operations of a school, their decisions shape the systems of accountability, oversight, and support that ultimately influence student outcomes. By focusing on the key indicators outlined in this manual, boards can move beyond reactive oversight and toward proactive governance that strengthens the long-term sustainability of the school.

Throughout this manual, the indicators and reflection tools have been designed to help boards identify early signals of both success and struggle across essential domains. Monitoring these indicators allows governing boards to ask more strategic questions, engage in deeper conversations with school leadership, and ensure that the organization remains aligned with its mission. When boards regularly review data and support school leaders in addressing emerging challenges, they create an environment where improvement is possible before problems become crises. Through thoughtful oversight, boards help ensure that leadership, governance, finances, talent, culture, and instruction remain aligned around the ultimate goal: providing students with a high-quality educational experience.

Many charter schools experience periods of strain. Leadership transitions, enrollment shifts, financial pressures, staffing challenges, or academic performance concerns can create complex conditions that require coordinated responses. When multiple areas of risk are present, the most effective boards respond by moving from informal monitoring to intentional intervention and support. Rather than attempting to solve complex challenges alone, boards should consider engaging additional expertise. Many organizations specialize in charter school governance, school improvement, leadership coaching, and financial oversight. External partners can help boards diagnose challenges more deeply and develop actionable improvement strategies.

External School Improvement Partners



This manual is not intended to serve as a checklist to be completed once, but as a reflection tool to be used regularly. As your school evolves, the questions, metrics, and actions included in these sections can guide board discussions, inform strategic planning, and support continuous improvement. By engaging with these tools thoughtfully and consistently, governing boards can strengthen their capacity to steward their schools responsibly. When boards remain focused on mission, attentive to early signals of distress, and dedicated to supporting effective leadership, they position their schools not only to endure, but to flourish for the students and communities they serve for years to come.

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Appendices

Appendix A Indicator Reflection and Planning Tool

Building Sustainable Charter Schools:
A Training Manual and Reflection Tool for Colorado Charter School Governing Boards
 By Kia Murray - Spring 2026
Indicator Reflection and Planning Tool

Indicator	Metric	What current evidence is available to inform our rating of this metric?	Risk Level	Monitor?	How will the Board Monitor/Measure Success?	What key questions will we ask?	What actions might we take?
Leadership	Leading school improvement		▼	▼			
	Leadership responsibilities		▼	▼			
	Feedback and growth		▼	▼			
Governance	Board member skill sets		▼	▼			
	Board deliberation		▼	▼			
	Board strategy		▼	▼			
Finance and Operations	Student enrollment		▼	▼			
	Budget management		▼	▼			
	Financial controls		▼	▼			
Talent	Staff retention		▼	▼			
	Staff capacity		▼	▼			
	Staff development		▼	▼			
Culture	Student culture		▼	▼			
	Staff culture		▼	▼			
	Community Culture		▼	▼			
Instruction	Academic progress		▼	▼			
	Quality resources		▼	▼			
	Systems of support		▼	▼			

Link to the live, fillable document: <https://docs.google.com/spreadsheets/d/1ly2yUKKNdv1oeQL-n1EWdakEx8YjiCnW289Tpcn99eM/edit?usp=sharing>

Appendix B How to Use the Indicator Reflection and Planning Tool

How to Use the Indicator Reflection and Planning Tool

The Indicator Reflection and Planning Tool is designed to help charter school governing boards identify early signs of school strength or potential risk across six key domains

This tool is intended to support structured reflection and proactive oversight, not to serve as a formal evaluation of the school leader or the school itself. Boards should use the tool periodically (for example, once or twice per year) to review indicators of school health and identify areas that may require additional monitoring or board attention.

Step 1: Review the Indicator Description

Before completing the tool, board members should review the relevant section of the manual for each metric. Each metric includes:

- Signals of Success
- Signals of Struggle
- Suggested ways to measure the metric
- Questions boards may ask
- Potential board actions

These descriptions provide the evidence base for determining the level of risk.

Step 2: Consider Available Evidence

Boards should consider available evidence related to the metric. Evidence may include:

- School performance data
- Strategic plans
- Financial reports and audits
- Staff or family survey data

- Board meeting materials
- Reports from the school leader

Ratings should be based on observable evidence and data whenever possible, rather than perceptions alone.

Step 3: Determine the Risk Level

For each metric, the board should determine whether the school's current practices align more closely with the **Signals of Success** or **Signals of Struggle** described in the manual.

Use the following guidance to determine the risk level.

Low Risk – The school's practices consistently align with the Signals of Success described in the manual. Systems are well established, regularly implemented, and supported by clear evidence or data. The board can continue routine monitoring of this area.

Medium Risk – The school demonstrates some signals of success and some signals of struggle. Systems may exist but may be inconsistently implemented, newly developed, or beginning to show signs of concern. The board may wish to monitor this area more closely and request additional information from the school leader.

High Risk – The school's current practices align primarily with the Signals of Struggle described in the manual. Systems may be weak, inconsistent, or missing entirely. Evidence suggests that the issue could negatively impact school performance or sustainability if not addressed. The board should prioritize this area for discussion and monitoring.

Step 4: Identify Monitoring Strategies

For each metric, boards should determine whether the indicator requires ongoing monitoring. If so, the board should identify:

- What data or evidence will be reviewed
- How frequently the board will review it

- Who is responsible for reporting the information

See the manual's section on data dashboards to support with indicator monitoring.

Step 5: Document Questions and Actions

The final columns of the tool help boards translate reflection into action by identifying:

- Key questions the board will ask
- Specific actions the board may take