



Opportunity Public Charter School Performance Framework

Introduction

Pursuant to Tennessee Code Annotated (T.C.A.) § 49-13-143, authorizers must establish performance-related provisions within a charter agreement “based on a performance framework that clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the authorizer’s evaluation of each public charter school”. An authorizer may develop and adopt a performance framework for its authorized charter schools or adopt the model performance framework developed by the Tennessee State Board of Education (State Board). If the authorized charter school is an opportunity public charter school, the authorizer may also develop and adopt a separate performance framework for opportunity public charter schools or adopt the State Board’s opportunity public charter school performance framework.

State law requires performance frameworks developed by the State Board to include, at a minimum, student academic performance, achievement gaps between major student subgroups, postsecondary readiness, and financial performance and sustainability. Additionally, State Board Policy 6.111 – [Quality Charter Authorizing Standards](#) requires authorizers to incorporate a performance framework into the charter agreement that clearly defines indicators, measures, metrics, and targets for academic, financial, and organizational performance.

Performance Frameworks Generally

This performance framework defines the three performance domains – academic, financial and organizational – and provides authorizers with a model to modify and adopt for their own use, in accordance with the requirements and expectations set forth in state law and the Quality Charter Authorizing Standards. **This document includes highlighted text for authorizers to review and adjust, at a minimum, prior to adopting. Highlighted or not, all performance indicators, measures, and ratings in this document are provided as a model and may be adjusted as necessary to align with an authorizer’s context, goals, and unique portfolio of charter schools.**

Performance frameworks are designed to answer the following questions:

- Is the school academically successful?
- Is the school financially healthy?
- Is the school organizationally sound?

The performance framework provides the benchmarks by which charter schools are annually evaluated. A charter school’s outcomes indicate the overall success and health of the charter school and is used to inform the need for potential interventions as well as renewal and revocation decisions. An authorizer’s intervention policy lays out the possible interventions and sanctions for failure to meet the standards set forth in the performance framework.

Charter schools annually receive ratings for the measures within a performance domain as well as a composite score for each of the three performance domains. A charter school’s performance on these measures must be published in the authorizer’s annual report.

A Performance Framework for Opportunity Public Charter Schools

Public Chapter 1066 of 2024 established the opportunity public charter school as a charter school serving grades 6-12 where at-risk students, as defined in T.C.A. § 49-13-104(3), constitute at least 75% of the school's enrolled student population. In accordance with state law, if an opportunity public charter school's at-risk enrollment drops below 75% for three consecutive years, the school must amend its charter agreement to forfeit its designation as an opportunity public charter school, or voluntarily close.

The State Board's opportunity public charter school performance framework was developed prior to the opening of an opportunity public charter school in Tennessee; therefore, the State Board acknowledges the data limitations in developing specific, meaningful, and ambitious metrics for these schools. This document contains proposed indicators and metrics for an opportunity public charter school that are based on research and recommendations from educators, leaders, and organizations in Tennessee and nationally who are working to serve similar populations of at-risk students in both traditional and charter school settings.

Given this, the State Board recommends that authorizers commit to the following:

1. Revisiting and revising performance framework measures as data trends begin to emerge for their opportunity public charter school(s). The State Board commits to reviewing the measures included in this opportunity public charter school performance framework within the next 3-5 years as more opportunity public charter schools are open and operating and state-level data becomes available as well.
2. Holding opportunity public charter schools harmless on the academic framework in Years 1 and 2 of operation. State accountability metrics already hold these schools harmless for letter grades in Year 1, and allowing opportunity public charter schools a second year for indicators within the academic framework is an appropriate on-ramp for these unique schools. This recommendation does not negate the need to hold robust academic performance conversations; however, the State Board recommends accountability decisions be on delay until the school has been operating long enough and with enough students to establish patterns and trends.

When adopting the opportunity public charter school performance framework, authorizers should develop their own introduction and remove these pages.

I. Academic Framework

The Academic Framework measures the academic performance of an opportunity public charter school utilizing metrics such as proficiency, growth, postsecondary readiness, and mission-specific goals. The academic framework is comprised of four weighted indicators, as outlined below. Additional details and explanations for these indicators are included in the pages that follow. An opportunity public charter school will receive a rating for each measure/indicator as well as an overall score for its academic performance.

Authorizers may choose to include specific academic outcomes that would trigger intervention in accordance with their Intervention Policy.

Indicators
A. Student Outcomes (20%)
<ul style="list-style-type: none">School Letter Grade
B. Student Engagement (40%)
<ul style="list-style-type: none">Average Daily Attendance RateCredit Attainment (high school only)Postsecondary, Military, and Workforce PreparationGraduation Rate (high school only)
C. Growth (30%)
<ul style="list-style-type: none">TVAAS Overall Composite Index
D. Mission-Specific Goal(s) (10%)
<ul style="list-style-type: none">See Appendix A

A. Student Outcomes (20%)

The Student Achievement indicator is aligned to the Tennessee Department of Education’s (Department) accountability framework for opportunity public charter schools¹. An opportunity public charter school’s assigned letter grade in the accountability cycle will be used as the complete measure for this indicator based on the table below. In the event that letter grades are not available (i.e., low *n*-count, paused, hold harmless, etc.), the Student Outcomes weight will be reallocated equally across the available measures within the Academic Framework. In accordance with state accountability requirements, an opportunity public charter school in its first year of operation will not receive a school letter grade and therefore will be held harmless for this indicator.

If the Department adjusts any indicators in future accountability protocols, the same will be adjusted within this performance framework such that this section will continue to align with the state’s accountability framework for opportunity public charter schools. Please see the Department’s [accountability webpage](#) and the [accountability framework for opportunity public charter schools](#) approved by the State Board for definitions, data sources, and information on how the measures are calculated.

Description	Exceeds Standard	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
School performance, as measured by the Department’s accountability framework for opportunity public charter schools	A	B	C	D or F

¹ In accordance with T.C.A. § 49-6-3402, on December 18, 2024 the Department recommended, and the State Board [adopted](#), an opportunity public charter school accountability framework. The framework is a modified version of the state’s letter grade formula and includes several key adjustments to measure academic growth and performance.

B. Student Engagement (40%)

Student Engagement is a critical measure in determining the success of any school serving at-risk students as it is often a precursor to academic outcomes. Research shows that a supportive environment is important for re-engaging disconnected youth, as are practices used by programs that have achieved positive outcomes for the student population these schools are designed to serve. The Student Engagement indicator includes key measures that ensure students are actively engaged in school and making necessary gains which move them closer to graduation. Data sources and instructions for calculating the student engagement measures are included below.

Description	Exceeds Standard	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Average Daily Attendance Rate (middle and high schools)	The school's average daily attendance rate is 80% or greater	The school's average daily attendance rate is between 70-79%	The school's average daily attendance rate is between 60-69%	The school's average daily attendance rate is less than 60%
Credit Attainment (high school only)	At least 80% of students earned 5 or more credits or are on-track for graduation	70-79% of students earned 5 or more credits or are on-track for graduation	60-69% of students earned 5 or more credits or are on-track for graduation	Less than 60% of students earned 5 or more credits or are on-track for graduation
Postsecondary, Military, and Workforce Preparation (middle and high schools)	At least 80% of students completed an approved preparation course, credential or activity	70-79% of students completed an approved preparation course, credential or activity	60-69% of students completed an approved preparation course, credential or activity	Less than 60% of students completed an approved preparation course, credential or activity
Graduation Rate (high school only)	At least 80% of grade 12 students graduated within one year	70-79% of grade 12 students graduate within one year	55-64% of grade 12 students graduate within one year	0-54% of grade 12 students graduate within one year

Calculating Student Engagement Measures:

- Minimum N-Count: For the purposes of the academic framework, an authorizer shall include the data of any group of students within the opportunity public charter school that has at least 20 students.
- Average Daily Attendance Rate: This measure is calculated using the opportunity public charter school's student information system and is an average over the full school year. Cut scores were determined using national attendance averages for students in an alternative school setting, as published via the [National Charter Schools Institute's](#) Alternative Education Campuses data dashboard, and may require periodic adjustments based on changes to national trends.
- Credit Attainment: This measure is calculated using the opportunity public charter school's student information system and state reporting

databases and is only evaluated for schools serving students in grades 9-12. To be considered “on-track for graduation”, a student must have earned at least five credits each academic year beginning in grade 9 and is therefore seamlessly promoted to the next grade.

- Postsecondary, Military, and Workforce Preparation: This measure is calculated using the opportunity public charter school’s student information system and any other reporting metrics agreed upon by the school and the authorizer. Students must annually complete at least one of the following courses, activities, or credentials:

Students in Grades 6-8:

- State Board-approved Career Awareness, Career Exploration, or Career Advising and Planning course
- Year 1 [career and technical education course](#) in a State Board-approved program of study
- Job shadowing experience
- College campus tour²

Students in Grades 9-12:

- Tier 1, 2 or 3 [Tennessee Promoted Industry Credential](#)
- Advanced Placement course
- Dual Enrollment course
- Qualifying [work-based learning](#) experience
- JROTC course

- Graduation Rate: This measure evaluates the percentage of students assigned to grade 12 that receive a regular high school diploma or an alternate academic diploma³ within one year. A student’s classification into grade 12 is based on credits earned and therefore reflects that the student has accumulated the necessary credits to be on track for end-of-year graduation.

² Credit toward this measure shall only be awarded for a student who has attended a college campus tour organized by the opportunity public charter school. A student can only earn credit toward this metric once while enrolled in grades 6, 7 or 8 at the opportunity public charter school.

³ State Board Policy 2.103

C. Growth (30%)

The Growth indicator uses the Tennessee Value-Added Assessment System (TVAAS) to measure student growth year over year, regardless of whether the student is proficient on the state assessment. In calculating a TVAAS score, a student’s performance is compared relative to the performance of his or her peers who have performed similarly on past assessments. If a school does not have a TVAAS score, the weight will be reallocated evenly among the other indicators in the Academic Framework. A school’s TVAAS overall composite index is reported via the Department’s data downloads page and the [Report Card](#).

Description	Exceeds Standard	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
TVAAS Overall Composite Index	TVAAS Composite Level 4 or 5	TVAAS Composite Level 3	TVAAS Composite Level 2	TVAAS Composite Level 1

D. Mission-Specific Goal(s) (10%)

The State Board’s Quality Charter Authorizing Standards require authorizers to provide its charter schools with the option to incorporate mission-specific performance measures for which the school has presented valid, reliable, and rigorous means of assessment approved by the authorizer. See Appendix A for the school’s mission-specific goal(s) and outcome for this indicator. If a school decides not to incorporate a mission-specific goal, this indicator’s weight will be reallocated across the remaining academic indicators equally. *Authorizers may choose to require all schools to develop a mission-specific goal to ensure consistency across performance framework ratings.*

A mission-specific goal is unique to the charter school and pre-determined in collaboration with [authorizer]. The inclusion of a mission-specific goal offers an opportunity:

- To showcase what makes the school unique based on the model described within the charter application and the at-risk population an opportunity public charter school is required to serve;
- To include supplemental data for a school that is staggering its opening by grade level; and
- To capture additional data aligned with the school’s mission that may be outside the scope of what is measured within the Academic Framework.

The opportunity public charter school must adhere to the guidelines established in this document to develop its proposed mission-specific goal(s). [Authorizer] will either approve a goal as is and incorporate it within the performance framework or will engage in further negotiations. A school may choose to include up to three short- and/or long-term mission-specific goals depending on the outcomes the school is looking to measure during the tenure of its charter agreement. The school may choose to make changes to its mission-specific goal during the interim review. If a school must adjust its mission-specific goal at any other time during the term of the charter agreement, the school must notify the authorizing staff to determine the materiality of the adjustment and understand that an amendment to the charter agreement may be required.

Mission-specific goal(s) will be discussed with the school during site visits, annual reviews, and at the interim review. The mission-specific goal(s) will also be considered in high-stakes decisions, including intervention, renewal, and revocation. The school is responsible for reporting the pre-determined and aggregated data by the specified date established in Appendix A. Failure to report this data will result in the charter school receiving a “Does Not Meet Standard” for the mission-specific goal.

II. Financial Framework

Another important marker of the short-term and long-term success of a charter school is financial performance. While a charter school has autonomy to manage its finances, it is incumbent upon the authorizer to assess the financial health of the school. The Financial Framework measures the financial outcomes of a school utilizing near term and sustainability indicators, which are outlined below. A rating of “Does Not Meet Standard” on a single measure is not necessarily an indication of financial distress, though understanding the reason for the financial underperformance, assessing the severity of the situation, and if necessary, a determination of an appropriate course of action or intervention will follow.

Financial performance metrics are calculated primarily by using the audited financial statements for each school, which are prepared in conformity with accounting principles generally accepted in the United States as prescribed by the Governmental Accounting Standards Board (GASB). Consequently, a charter school’s financial audit’s Statement of Net Position and Statement of Activities are presented in a consolidated manner with all schools operated under a single network. While the consolidated financial statements are utilized in the majority of the Financial Framework for measuring the near term and sustainability measures of the charter school, a school’s independent financial position will also be considered. Appendix B contains the complete list of GASB audit sources.

Authorizers may choose to include specific financial outcomes that would trigger intervention in accordance with their Intervention Policy.

Indicators (all weighted equally)
A. Near Term Indicators
• Current Ratio
• Unrestricted Days Cash
• Debt Default
• Enrollment Variance
B. Sustainability Indicators
• Total Margin and Aggregated Three-Year Total Margin Ratio
• Debt to Asset Ratio
• Debt Service Coverage Ratio
• Unrestricted Fund Balance
• Total Margin by School (if applicable)

A. Near Term Indicators

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Current Ratio			
<p>The Current Ratio depicts the relationship between a school’s current assets and current liabilities and measures a school’s ability to pay its obligations over the next 12 months by calculating Current Assets divided by Current Liabilities.</p> <p>Source: Audit “Statement of Net Position”</p>	<p>Current Ratio is greater than or equal to 1.1 OR Current Ratio is between 1.0 and 1.1 and one-year trend is positive</p> <p>For schools in Year 1 or 2, Current Ratio must be greater than or equal to 1.1</p>	<p>Current Ratio is between 0.9 and 1.0 or equal to 1.0 OR Current Ratio is between 1.0 and 1.1 and one-year trend is negative</p>	<p>Current Ratio is less than 0.9</p> <p>For schools in Year 1 or 2, Current Ratio is less than 1.1</p>
Unrestricted Days Cash⁴			
<p>The Unrestricted Days Cash indicates how many days a school can pay its expenses without another inflow of cash. To calculate, the Unrestricted Days Cash is divided by $(\text{[Total Expenses minus Depreciation Expense]} / 365)$.</p> <p>Source⁵: Audit “Statement of Net Position” (Cash), “Statement of Activities” (Depreciation, Total Expenses)</p>	<p>Unrestricted Days Cash is greater than or equal to 60 days OR Between 30-59 days and one-year trend is positive</p> <p>For schools in Year 1 or 2, Unrestricted Days Cash is 30 days or greater</p>	<p>Unrestricted Days Cash is greater than or equal to 30 days but less than 60 days AND one-year trend is negative</p>	<p>Unrestricted Days Cash is less than or equal to 30 days</p> <p>For schools in Year 1 or 2, Unrestricted Days Cash is less than 30 days</p>
Debt Default			
<p>Debt Default indicates that a school has not met debt service payment obligations or has failed to comply with financing covenants <i>and</i> the lender or financing source has notified a school that it is in default.</p> <p>Source: Received directly from school</p>	<p>School is not in default of loan covenant(s) and is not delinquent with debt service payments</p>	<p>School is in default of loan covenant(s) but has worked with lender(s) to restructure debt service payments</p> <p><i>Authorizers may choose to make this N/A.</i></p>	<p>School is in default of loan covenant(s) and/or is delinquent with debt service payments</p>

⁴ Unrestricted Days Cash is one of the most important financial performance measures for a charter school.

⁵ If Cash is not detailed in an audit, then the school must provide this information directly to the authorizer.

Enrollment Variance			
<p>Enrollment variance is determined by calculating the Actual ADM (June 30 ADM) divided by Enrollment Projection used on June 1 Charter School Board-Approved Budget. Schools will be allowed one board-approved revised budget in a fiscal year.</p> <p><i>Authorizers may decide to remove this allowance for one revised budget or keep as recommended.</i></p> <p>Source: Received directly from school</p>	<p>Enrollment Variance is greater than or equal to 95 percent in the most recent year</p>	<p>Enrollment Variance is between 85 percent and 95 percent in the most recent year</p>	<p>Enrollment Variance is less than or equal to 85 percent in the most recent year</p>

B. Sustainability Measures

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Total Margin and Aggregated Three-Year Total Margin Ratio			
<p>Total Margin measures the deficit or surplus a school yields out of its total revenues in the most recent fiscal year, which is calculated as the Net Position divided by Total Revenues.</p> <p>Aggregated Three Year Total Margin Ratio measures the aggregated three-year to assess financial stability, which is calculated as the Total Three-Year Change in Net Position divided by Total Three-Year Revenues.</p> <p>Source: Audit “Statement of Activities” (Total Revenues) and “Statement of Activities” (Change in Net Position)</p>	<p>Aggregated three-year total margin is positive, and the most recent year total margin is positive OR Aggregated three-year total margin is greater than -1.5%, the trend is positive for the last two years, and the most recent year total margin is positive</p> <p>For schools in Year 1 or 2, the Aggregated two-year total margin (if applicable) and the most recent year total margin is positive</p>	<p>Aggregated three-year total margin is greater than -1.5%, but the trend does not “Meet Standard”</p>	<p>Aggregated three-year total margin is less than or equal to -1.5% OR the most recent year total margin is less than -10%</p> <p>For schools in Year 1 or 2, the Aggregated two-year total margin (if applicable) is negative or zero OR the most recent year total margin is negative or zero</p>
Debt to Asset Ratio			
<p>The Debt to Asset Ratio measures the amount of liabilities a school owes versus the assets they own, which is calculated as the Total Liabilities divided by Total Assets.</p> <p>Source: Audit “Statement of Net Position”</p>	<p>Debt to Asset Ratio is less than or equal to 0.9</p>	<p>Debt to Asset Ratio is greater than 0.9 but less than or equal to 1.0</p>	<p>Debt to asset ratio is greater than 1.0</p>

Debt Service Coverage Ratio			
<p>The Debt Service Coverage Ratio indicates a school's ability to cover its debt obligations, which is calculated as (Net Position + Depreciation Expense + Interest Expense) divided by (Annual Principal + Interest Expense + Lease Expense).</p> <p>Source⁶: Audit "Statement of Activities," "Statement of Net Position," and "Notes to Financial Statements"</p>	Debt Service Coverage Ratio is greater than or equal to 1.1	Debt Service Coverage Ratio is less than 1.1	Not Applicable
Unrestricted Fund Balance			
<p>Unrestricted Fund Balance is the total amount of net assets available for future operations or investment in growth exclusive of restrictions, which is calculated as Unrestricted Fund Balance ÷ Total Operating Expenditures.</p> <p>Source: Audit "Balance Sheet" or "Statement of Net Position" (Unrestricted Fund Balance) and "Statement of Activities" (Total Expenses)</p>	Unrestricted Fund Balance is greater than or equal to 16.67% of total annual operating expenses	Unrestricted Fund Balance is greater than 8.33% and less than 16.67% of total annual operating expenses	Unrestricted Fund Balance is less than 8.33% of total annual operating expenses

⁶ If Rent/Lease Expense is not detailed in the audit, the school must provide this information directly.

Total Margin by School ⁷ (if applicable)			
<p>Total Margin by School is Change in Net Position for the authorized school divided by Total Revenues for the authorized school</p> <p>Aggregated Total Margin is Total Three-Year Change in Net Position divided by Total Three-Year Revenues for the authorized school</p> <p>Source: Audit “Statement of Revenues, Expenditures, and Changes in Fund Balance by School”</p>	<p>Aggregated Three-Year Total Margin by School is positive, and the most recent year Total Margin by School is positive OR Aggregated Three-Year Total Margin by School is greater than -1.5%, the trend is positive for the last two years, and the most recent year Total Margin by School is positive</p> <p>For schools in Year 1 or 2, Aggregated Two-Year Total Margin by School (if applicable) is positive and the most recent year Total Margin by School is positive</p>	<p>Aggregated Three-Year Total Margin by School is greater than -1.5%, but trend does not “Meet Standard”</p>	<p>Aggregated Three-Year Total Margin by School is less than or equal to 1.5% OR most recent year Total Margin by School is less than -10%</p> <p>For schools in Year 1 or 2, Aggregated Two-Year Total Margin by School (if applicable) is negative or zero OR the most recent year Total Margin by School is negative or zero</p>

⁷ Charter schools may strategically plan to operate at a deficit in a given fiscal year. This often involves reducing unrestricted fund balance to support initiatives such as growth or expansion; investments in technology; adoption of new curricula; implementation of academic corrective action plans to improve school performance; or facilities and other capital improvements. **While any deficit in the most recent fiscal year results in a school not meeting this standard, a documented, planned deficit will be considered when evaluating schools that do not meet this standard.**

III. Organizational Framework

The Organizational Framework provides a comprehensive lens through which authorizers can assess the extent to which the opportunity public charter school is meeting operational expectations and protecting student and public interests while simultaneously honoring the school’s rightful autonomy to design and deliver school models that meet students’ needs. Any deficiencies or weaknesses identified in the organizational framework may be an indicator of the overall health of a school. The indicators outlined below focus on the presence and quality of school processes that are legally or ethically required, including board oversight, compliance reporting, protecting the rights of students and staff, ensuring a safe school culture, and adhering to health and safety codes. Data sources for these indicators can be found in Appendix C.

Authorizers may choose to include specific organizational outcomes that would trigger intervention in accordance with their Intervention Policy.

Indicators (all weighted equally)	
A. Education Program	D. Students and Employees
<ul style="list-style-type: none"> Charter Terms Compliance with Education Requirements At-Risk Student Enrollment Student Enrollment Over Time Student Retention Rates Student Retention Rates by Subgroup Rights of Students with Disabilities Rights of English Learners 	<ul style="list-style-type: none"> Rights of Students Chronic Absenteeism Personalized Student Plans Student & Family Survey Licensing & Credentialing Rights of Employees Background Checks
B. Financial Management and Oversight	E. School Environment
<ul style="list-style-type: none"> Financial Reporting and Compliance Generally Accepted Accounting Principles Financial Oversight 	<ul style="list-style-type: none"> Facilities and Transportation Health and Safety Data and Information Management
C. Governance and Reporting	F. Additional Obligations
<ul style="list-style-type: none"> Governance Requirements Accountability of Management Reporting Requirements 	

A. Education Program

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Charter Terms			
<p>The school implements the material terms of the education program related to governance, financial, operational, and academic structure, as defined in the current charter agreement.</p>	<p>The school implemented the material terms of the education program in all material respects and the education program in operation reflects the material terms as defined in the charter agreement, or the school has gained approval for a charter modification to the material terms pursuant to T.C.A. § 49-13-110. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to implement the material terms of the education program in the manner described above. Once the shortcoming(s) were identified, the school did not promptly come into compliance.</p>	<p>The school failed to implement its program in the manner described above. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Compliance with Education Requirements			
<p>The school complies with applicable education requirements, including but not limited to:</p> <ul style="list-style-type: none"> • Instructional days or minutes • Graduation, promotion, and retention • Tennessee Academic Standards • State Assessments • Implementation of Response to Instruction and Intervention (RTI²) • Implementation of mandated programming due to state or federal funding 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to education requirements. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions relating to education requirements. Once the shortcoming(s) were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions relating to education requirements. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>

At-Risk Student Enrollment			
The school enrolls at least 75% at-risk students, as required in T.C.A. § 49-13-133.	The school's overall average of at-risk student enrollment was 75% or higher.	The school's overall average at-risk student enrollment was less than 75%.	N/A
Student Enrollment Over Time ⁸			
The school has consistent enrollment over time. ⁹	The school's enrollment is greater than or no more than 10% below its previous year's enrollment.	The school's enrollment is between 10% and 20% below its previous year's enrollment.	The school's enrollment is greater than 20% below its previous year's enrollment.
Student Retention Rates			
The school is retaining its students throughout the year and year over year. ¹⁰	The school maintained at least a 70% student retention rate.	The school maintained a student retention rate between 60% and 70%.	The school maintained a student retention rate at or below 60%.
Student Retention Rates by Subgroup			
The school is retaining students that fall within special populations subgroups, including students with disabilities, English Learners, economically disadvantaged students, and Black, Hispanic, and Native American subgroups at a similar rate to their overall student retention rate.	The school maintains subgroup retention rates within 5 percentage points of the school's overall student retention rate. If shortcomings were identified, the school promptly came into compliance.	The school has subgroup retention rates between 5 and 10 percentage points below the school's overall student retention rate. Once the shortcomings were identified, the school did not promptly come into compliance.	The school has subgroup retention rates greater than or equal to 10 percentage points below the school's overall student retention rate. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.

⁸ This indicator assesses a school's consistent enrollment over time. *Authorizers may consider adjusting this metric to assess the extent to which the school is fully enrolled in accordance with the charter agreement rather than ensuring consistent enrollment over time, as recommended.*

⁹ A school that is opening one grade level each year, known as "scaling", will be held to the comparable enrollment of the previous year's enrollment count as outlined in the school's growth plan included in the charter application and/or charter agreement. A school in its first year of operation will be held harmless on this indicator.

¹⁰ A school without a previous year's student retention rate will be held to a 70% threshold. *Authorizers may consider changing the recommended threshold of 70% as it may not be appropriate for its opportunity public charter school(s).*

Rights of Students with Disabilities

<p>The school is protecting the rights of students with disabilities as required in the charter agreement, the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act, including but not limited to:</p> <ul style="list-style-type: none"> • Equitable access and opportunity to enroll • Identification and referral (i.e., Child Find) • Appropriate development and implementation of Individualized Education Program (IEP) and Section 504 plans, in compliance with required timelines • Sufficient staffing aligned with federal/state law • Communication requirements with parents or guardians • Inclusive services in the least restrictive environment and appropriate inclusion in the school, including its academic program, assessments, extracurricular activities • Discipline, including due process protections, manifestation determinations, and behavioral intervention plans • Access to the school’s facility and program in a lawful manner and consistent with students’ IEPs or Section 504 Plans • Securing and properly accounting for all applicable federal and state funding 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions relating to the treatment of students with identified disabilities and those suspected of having a disability. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions relating to the treatment of students with identified disabilities and those suspected of having a disability. Once the shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies, procedures, and provisions relating to the treatment of students with identified disabilities and those suspected of having a disability. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
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Rights of English Learners

<p>The school is protecting the rights of English Learner (EL) students as required under Title I and III of Every Student Succeeds Act (ESSA), including but not limited to:</p> <ul style="list-style-type: none"> • Equitable access and opportunity to enroll • Required policies and notifications related to the service of EL students • Proper steps for identification of students in need of EL services 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions relating to English Learners. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions relating to English Learners. Once the shortcomings were identified, the school</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies, procedures, and provisions relating to English Learners. Once shortcomings were identified, the school did not come into compliance,</p>
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<ul style="list-style-type: none"> • Appropriate and equitable delivery of inclusive services to identified students • Communication requirements with parents or guardians • Compliance with 1:35 EL teacher to student ratio • Annual assessment of EL students (screener and annual assessment) • Appropriate development and implementation of Individual Learning Plan (ILP), in compliance with required timelines • Exiting of students from EL services, including ongoing monitoring of exited students • Securing and properly accounting for all applicable federal and state funding 		<p>did not promptly come into compliance.</p>	<p>or the failure was so severe that it outweighed any efforts to come into compliance.</p>
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B. Financial Management and Oversight

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Financial Reporting and Compliance			
<p>The school is meeting financial reporting and compliance requirements, including but not limited to:</p> <ul style="list-style-type: none"> • Complete and on-time submission of financial reports to the authorizer and any reporting requirements if contracting with an Education Service Provider (ESP) • Making payroll and related IRS submissions and payments on time, to include timely filing of IRS Form 990s • Making full and timely teacher and other retirement fund payments • Complete and on-time submission of all additional reporting requirements related to the use of public funds 	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter agreement relating to financial reporting requirements. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, and provisions relating to financial reporting requirements. Once the shortcoming(s) were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, and provisions relating to financial reporting requirements. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Generally Accepted Accounting Principles (GAAP)			
<p>The school is meeting basic financial management, controls, and oversight expectations, as evidenced by an annual independent audit, including but not limited to:</p> <ul style="list-style-type: none"> • An unmodified audit opinion • An audit devoid of significant findings, material conditions, or significant internal control weaknesses • An audit report that does not contain a going concern disclosure in the notes or an explanatory paragraph indicative of concern related to GAAP or material compliance with LEA rules and/or policies within the audit report 	<p>The school materially complies with applicable laws, rules, regulations, LEA policies and procedures, and provisions of the charter agreement relating to an annual independent audit. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, and provisions relating to an annual independent audit. Once the shortcoming(s) were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, and provisions relating to an annual independent audit. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Financial Oversight			
<p>The school and its governing board establish, approve, and monitor annual budget execution and safeguards the financial health and activities of the school through:</p>	<p>The school and its governing board establish, approve and monitor annual budget execution and safeguard the</p>	<p>N/A</p>	<p>The school and its governing board have not put into place, have not institutionalized, or does not</p>

<ul style="list-style-type: none"> • Finance-related policies for accounting, segregation of duties, budget development and approval process, purchasing and procurements, etc. • Consistent review of financial reports and statements • Annual budget development and approval with adjustments as needed • Board review of independently audited financial statements, reports, etc. that suggest all findings, significant or deficient, are being addressed • Appropriate in-house, employed financial expertise and/or contracts with a reputable, proven, financial services provider 	<p>financial health and activities of a school. If shortcomings were identified, the school promptly came into compliance.</p>		<p>have the capacity to engage in adequate, responsible fiscal oversight.</p>
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C. Governance and Reporting

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Governance Requirements			
<p>The school materially complies with applicable governance requirements, including but not limited to, those related to:</p> <ul style="list-style-type: none"> • Charter school board policies • Charter school board bylaws • State open meetings and public records laws • Code of ethics • Conflicts of interest • Board member training • Charter school board composition and/or membership rules pursuant to T.C.A. § 49-13-109 (e.g. inclusion of a parent on board or proper membership on school advisory council) 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to governance by its board. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to governance by its board. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to governance by its board. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Management Accountability¹¹			
<p>The governing board maintains authority over management, including but not limited to:</p> <ul style="list-style-type: none"> • Evaluation of the school leader • Regular review of the school’s academic, financial and organizational performance data • Holding the ESP or CMO accountable for performance expectations, as agreed under a written contract, in accordance with the charter agreement, as applicable • Requiring annual financial reports of the ESP or CMO, as applicable 	<p>The governing board demonstrates sound governance through practices that maintaining authority over management and foster accountability for performance.</p>	<p>The governing board is developing or in need of improvement regarding its management and accountability practices.</p>	<p>The governing board failed to implement sound governance and the failure(s) was (were) material and significant to the viability of the school.</p>

¹¹ For schools contracting with an Educational Service Provider (ESP) or Charter Management Organization (CMO)

Compliance with Reporting Requirements

<p>The school complies with reporting requirements through the submission of timely, complete, and accurate reports to the authorizer, Tennessee Department of Education, and/or federal authorities, including but not limited to:</p> <ul style="list-style-type: none"> • Reporting calendar submissions • Attendance and enrollment reporting • State and federal compliance and oversight • Additional information requested by the authorizer 	<p>The school’s on-time completion rate for all reporting requirements is equal to or greater than 85%.</p>	<p>The school failed to meet a completion rate of 85% or higher for all reporting requirements; however, the school promptly came into compliance once shortcomings were identified.</p>	<p>The school failed to meet a completion rate of 85% or higher for all reporting requirements.</p>
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D. Students and Employees

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Rights of Students			
<p>The school protects the rights of all students, including but not limited to:</p> <ul style="list-style-type: none"> • Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment, including rights to enroll or maintain enrollment • Collection and protection of student information (that could be used in discriminatory ways or otherwise contrary to law) • Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and Establishment Clause restrictions prohibiting public schools from engaging in religious instruction • Policies and practices related to discipline, including discipline hearings, suspension and expulsion • Establishment of a process for addressing parent/community grievances • Equitable access and inclusive services to all students, including homeless students, students in foster care, migrant students, at-risk students¹², and gifted students 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to the rights of students. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to the rights of students. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to the rights of students. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Chronic Absenteeism			
<p>The school is meeting chronic absenteeism goal outlined in its annual measurable outcomes (AMOs), as applicable.</p>	<p>The school is meeting its chronic absenteeism goals. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to meet its chronic absenteeism goals. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to meet its chronic absenteeism goals. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any</p>

¹² As defined in T.C.A. 49-13-104(3).

			efforts to come into compliance.
Personalized Student Plans			
The school develops personalized, data-driven plans for every student to meet academic and post-secondary goals.	The school develops personalized plans for every student. If shortcomings were identified, the school promptly came into compliance.	The school failed to develop personalized plans for every student. Once the shortcoming(s) were identified, the school did not promptly come into compliance.	N/A
Student & Family Survey			
The school administers and promptly responds to a student and family survey measuring safety, belonging, and support. Note: While all responses are considered, the participation rate in this metric is for student participation only.	The school administers a student and family survey with at least an 80% student participation rate and at least 65% of all respondents respond positively to questions related to safety, belonging, and support. The school promptly responds to feedback received from the survey.	The school administers a student and family survey with less than 80% of students participating or less than 65% of all respondents respond positively to questions related to safety, belonging, and support. -OR- The school does not promptly respond to feedback received from the survey.	The school does not administer a student and family survey or administers a student and family survey with less than 80% of students participating and less than 65% of all respondents respond positively to questions related to safety, belonging, and support.
Credentialing			
The school complies with teacher and other staff credentialing requirements relating to state certification requirements, including the federal Highly Qualified Teacher and Paraprofessional requirements with Elementary and Secondary Education Act (ESEA) as amended by ESSA.	The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to state certification requirements. If shortcomings were identified, the school promptly came into compliance.	The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to state certification requirements. Once shortcomings were identified, the school did not promptly come into compliance.	The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to state certification requirements. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any

			efforts to come into compliance.
Rights of Employees			
<p>The school protects the rights of employees, including those relating to:</p> <ul style="list-style-type: none"> • Family Medical Leave Act (FMLA) • Americans with Disabilities Act (ADA) • Employment contracts (if applicable) • Employees' rights to organize collectively 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to employment considerations. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to employment considerations. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to employment considerations. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Background Checks			
<p>The school complies with background check requirements of all applicable individuals, including staff, contractors, and volunteers, where applicable.</p>	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to background checks. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to background checks. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to background checks. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>

E. School Environment

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
Facilities and Transportation			
<p>The school complies with facilities and transportation requirements, including but not limited to:</p> <ul style="list-style-type: none"> • Building accessibility requirements outlined in Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973 • Fire and safety regulations promulgated by the Tennessee Fire Marshal’s Office • Viable certificate of occupancy or other required building use authorization • Asbestos inspections • Documentation of requisite insurance coverage • Facilities safety and security, including the welcoming and guiding of visitors and parents • Climate control, lighting systems, student furniture, building maintenance • Facility requirements in State Board Rule 0520-14-01-.04, if operating with a residential model • Student transportation, including transportation for students with disabilities, is safe, reliable and accessible 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to facilities, grounds and transportation. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to facilities, grounds and transportation. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to facilities, grounds and transportation. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Health and Safety			
<p>The school complies with all health and safety requirements, including but not limited to:</p> <ul style="list-style-type: none"> • Appropriate nursing services, school health reporting requirements, and dispensing of medication • Food service requirements • Emergency operations, including emergency operations plans and required drills/trainings 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to health and safety. If shortcomings were identified,</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to health and safety. Once shortcomings were identified, the school did not</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to relating to health and safety. Once shortcomings were</p>

<ul style="list-style-type: none"> • Health and safety requirements in State Board Rule 0520-14-01-.04, if operating with a residential model • Other state/district requirements 	<p>the school promptly came into compliance.</p>	<p>promptly come into compliance.</p>	<p>identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>
Data and Information Management			
<p>The school handles employee and student data and information appropriately, including but not limited to:</p> <ul style="list-style-type: none"> • Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act and other applicable laws • Access to documents maintained by the school under the state’s open records law and other applicable authorities • Transferring of student records • Proper and secure maintenance of testing materials 	<p>The school materially complies with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to handling of information. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to handling of information. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to comply with applicable laws, rules, regulations, policies and procedures, and provisions of the charter agreement relating to handling of information. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>

F. Additional Obligations

Description	Meets Standard	Does Not Meet Standard	Falls Far Below Standard
<p>The school complies with all other material, legal, statutory, regulatory, or contractual requirements contained in the charter agreement that are not otherwise explicitly stated herein, including but not limited to:</p> <ul style="list-style-type: none"> • Revisions to state or federal law • Applicable LEA policies and procedures • Consent decrees • Intervention requirements by the authorizer • Requirements by other entities to which the school is accountable (e.g., Tennessee Department of Education) 	<p>The school materially complies with all other material, legal, statutory, regulatory, or contractual requirements contained in the charter agreement that are not otherwise explicitly stated herein. If shortcomings were identified, the school promptly came into compliance.</p>	<p>The school failed to materially comply with all other material, legal, statutory, regulatory, or contractual requirements contained in the charter agreement that are not otherwise explicitly stated herein. Once shortcomings were identified, the school did not promptly come into compliance.</p>	<p>The school failed to materially comply with all other material, legal, statutory, regulatory, or contractual requirements contained in the charter agreement that are not otherwise explicitly stated herein. Once shortcomings were identified, the school did not come into compliance, or the failure was so severe that it outweighed any efforts to come into compliance.</p>

Appendix A: Mission-Specific Goal Guidance and Template

The following are guidelines for the development of a mission-specific goal.

1. The goal must be student-centered, outcome driven, and rely on quantitative data to determine the outcome.
2. The goal must be aligned to the mission for the school as outlined within the charter application.
3. The goal must not include metrics or assessments already utilized within the performance framework, such as TCAP achievement scores or TVAAS overall composite outcomes.
4. The goal must use pre-determined metrics to measure student success toward the mission. These metrics are not flexible and cannot change year over year to ensure comparison. Metrics may include:
 - a. Nationally-normed internal assessment data (e.g., NWEA MAP, ACT WorkKeys, ELPA21)
 - b. Performance-based assessments
 - c. ACT/SAT or ACT Work Keys
 - d. Student behavior goals
 - e. School climate surveys
 - f. Alumni surveys
 - g. Postsecondary and workforce readiness indicators not included in the Academic Framework
 - h. Additional exit requirements (e.g., internships, targeted exit cohorts, resume completion)
5. Schools must report on progress within the metrics toward the mission-specific goal. This must be demonstrated through aggregated (not raw) data and be clearly reported to the authorizer. The school must report accurate data and determine the extent to which they are meeting their goal(s).

Mission-Specific Goal(s)	
School Name:	
School's Mission: Provide the school's mission.	
Student Profile Summary: Describe the school's student population in 2-3 sentences.	

Mission-Specific Goal #1											
<p>Outcomes Driven Goal: State the mission-specific goal and the metrics used to measure this goal.</p>											
<p>Goal's Connection to Mission: In 3-4 sentences explain how the goal reflects the school's mission.</p>											
<p>Targets and Rationale: Input what would warrant each target level for the mission-specific goal and aligned metrics along with a rationale for these targets.</p>	<table border="1"> <thead> <tr> <th>Target</th> <th>Rationale for Target</th> </tr> </thead> <tbody> <tr> <td> <p>Exceeds <i>(insert criteria)</i></p> </td> <td></td> </tr> <tr> <td> <p>Meets <i>(insert criteria)</i></p> </td> <td></td> </tr> <tr> <td> <p>Does Not Meet <i>(insert criteria)</i></p> </td> <td></td> </tr> <tr> <td> <p>Falls Far Below <i>(insert criteria)</i></p> </td> <td></td> </tr> </tbody> </table>	Target	Rationale for Target	<p>Exceeds <i>(insert criteria)</i></p>		<p>Meets <i>(insert criteria)</i></p>		<p>Does Not Meet <i>(insert criteria)</i></p>		<p>Falls Far Below <i>(insert criteria)</i></p>	
	Target	Rationale for Target									
	<p>Exceeds <i>(insert criteria)</i></p>										
	<p>Meets <i>(insert criteria)</i></p>										
	<p>Does Not Meet <i>(insert criteria)</i></p>										
<p>Falls Far Below <i>(insert criteria)</i></p>											
<p>Assessment Details Describe the assessment used and the process and frequency of data collection.</p>											

**Appendix B:
GASB Audit Data Sources for Financial Framework**

Metric	Data for Calculation	Data Source
Current Ratio	Current Assets	Statement of Net Position
	Current Liabilities	Statement of Net Position
Unrestricted Days Cash	Cash & Cash Equivalents	Statement of Net Position
	Total Expenses	Statement of Activities
	Depreciation	Statement of Activities
Debt Default	Default/Delinquency	Directly from School
Enrollment Variance	Actual ADM (June 30 ADM)	Directly from School
	Budgeted Enrollment	Directly from School
Total Margin and Aggregated Three-Year Total Margin Ratio	Total Revenues	Statement of Activities
	Change in Net Position	Statement of Activities
Debt to Asset Ratio	Total Liabilities	Statement of Net Position
	Deferred Inflows	Statement of Net Position
	Total Assets	Statement of Net Position
	Deferred Outflows	Statement of Net Position
Debt Service Coverage Ratio	Change in Net Position	Statement of Activities
	Depreciation	Statement of Activities
	Interest Expense	Statement of Activities
	Rent and Lease Expenses	Notes to Financial Statements or Directly from School
	Short-term Debt	Statement of Net Position
	Current Portion of Long-term Debt	Statement of Net Position
Unrestricted Fund Balance	Unrestricted Fund Balance	Balance Sheet or Statement of Net Position
	Total Expenses	Statement of Activities

**Appendix C:
Data Sources for Organizational Framework**

Instructions for Authorizers: The table below includes general data sources for the organizational framework indicators. Authorizers should update this table with the actual data sources collected and/or evaluated for each indicator. For example, rather than including a general source like “Reporting Requirements”, authorizers should list the names of specific documents collected as part of the reporting requirements (e.g., testing calendar, bus driver certifications) or, rather than listing a general “Records Audit”, authorizers should define which records are audited for that indicator (e.g., quarterly IEP audit, a random selection of student cumulative folders). Specifically defining the data sources in the table below ensures transparency and consistency in the annual evaluation of a school. Authorizers should remove this paragraph when adopting this performance framework.

Indicator	Data Sources
Education Program	
Charter Terms	<ul style="list-style-type: none"> • Charter Agreement • Site visits • Policy and handbook reviews • Desktop monitoring • Reporting requirements
Compliance with Education Requirements	<ul style="list-style-type: none"> • Charter agreement • Student and/or education information system(s) • Site visits • Policy and handbook reviews • Desktop monitoring • Reporting requirements • Board assurances
At-Risk Student Enrollment	<ul style="list-style-type: none"> • Charter agreement • Student and/or education information system(s) • Reporting calendar • Record audits
Student Enrollment Over Time	<ul style="list-style-type: none"> • Charter agreement • Student and/or education information system(s)
Student Retention Rates	<ul style="list-style-type: none"> • Charter agreement • Site visits and student interviews • Student and/or education information system(s)
Student Retention Rates by Subgroup	<ul style="list-style-type: none"> • Charter agreement • Site visits and student interviews

	<ul style="list-style-type: none"> • Student and/or education information system(s)
Rights of Students with Disabilities	<ul style="list-style-type: none"> • Charter agreement • Desktop and/or state monitoring • Record audits • Site visits and stakeholder interviews • Policy and handbook reviews • Student and/or education information system(s) • Administrative complaints or due process hearing findings • Reporting requirements
Rights of English Learners	<ul style="list-style-type: none"> • Charter agreement • Desktop and/or state monitoring • Record audits • Site visits and stakeholder interviews • Policy and handbook reviews • Student and/or education information system(s) • Reporting requirements
Financial Management and Oversight	
Financial Reporting and Compliance	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements
Generally Accepted Accounting Principles	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Annual audit
Financial Oversight	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Policy reviews • Annual budget • Annual audit
Governance and Reporting	
Governance Requirements	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Policy reviews • School website • Governing body member interviews • Governing body meeting agendas, materials, and minutes • Conflict of interest statements and assurances

Data and Information Management	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • ESP or CMO contract (if applicable)
Reporting Requirements	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Student and/or education information system(s)
Students and Employees	
Rights of Students	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Policy and handbook reviews • Student enrollment forms and related forms • Lottery certification • Site visits and student interviews • Desktop monitoring • Record audits • Student and/or education information system(s)
Attendance	<ul style="list-style-type: none"> • Charter agreement • Student and/or education information system(s) • Annual measurable outcomes (AMOs)
Personalized Student Plans	<ul style="list-style-type: none"> • Policy and handbook reviews • Site visits • Student and educator interviews • Record audits
Student & Family Survey	<ul style="list-style-type: none"> • Reporting requirements • Site visits • Student and family interviews • Record audits
Credentialing	<ul style="list-style-type: none"> • Charter agreement • TNCompass • Site visits and educator interviews
Rights of Employees	<ul style="list-style-type: none"> • Charter agreement • Policy and handbook reviews • Site visits and educator interviews
Background Checks	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements

	<ul style="list-style-type: none"> • Record audits • Site visits
School Environment	
Facilities and Transportation	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Site visits and parent interviews • Record audits • Policy and handbook reviews
Health and Safety	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Site visits and parent interviews • Record audits • Policy and handbook reviews
Data and Information Management	<ul style="list-style-type: none"> • Charter agreement • Reporting requirements • Site visits • Record audits • Policy and handbook reviews
Additional Obligations	
Additional Obligations	<ul style="list-style-type: none"> • Charter agreement • Site visits