



Osprey Wilds

Environmental Learning Center

Annual Required Meeting
Compliance, Technical Assistance, and Oversight
in the 26-27 School Year



OW's Compliance Philosophy

WHY does OW require schools complete compliance reporting?

- ▶ Fulfill the primary purpose of charter schools: to improve the learning, achievement, and success of all students
- ▶ Fulfill OW's mission: to ensure quality academic and environmental literacy outcomes for Minnesota students through effective charter school authorizing (the authorizers' role and responsibilities is outlined in MN §124E.05)
- ▶ **Support boards to practice systemic risk management to be sustainable and good public stewards**

HOW does OW approach compliance reporting?

- ▶ Center student success and needs
- ▶ Focus on relationships with schools, leaders, and staff
- ▶ Reduce administrative burdens wherever possible



Responsive Authorizing

“As an approach, responsive authorizing advances accountability by way of high quality relationships, excellent service, and regular channels of communication. We believe that students are best served when authorizers and charter schools work together in service of a high quality education.”

Corey Loomis
Charter Schools Unit
Riverside County Office of Education



Compliance Spreadsheet

- ▶ Comprehensive document for many forms
- ▶ Reduces emails back and forth
- ▶ Live updates with clear criteria
- ▶ **It is the school's responsibility to keep it updated!**
 - ▶ Update the share access to the spreadsheet for your school as needed.



Ongoing work to support oversight

Annual Compliance Monitoring

- ▶ Annual budget reviews
- ▶ Agenda, board packet, and meeting minutes reviews
- ▶ Monthly and quarterly financial reports
- ▶ Board meeting observations
- ▶ Certificate of insurance
- ▶ Site visits / facility observation
- ▶ Ex-officio conflict of Interest disclosures
- ▶ Annual charter school assurances
- ▶ ABC compliance certificates
- ▶ EMO / CMO assurances

Renewal Compliance Monitoring

- ▶ Annual Report
- ▶ Affiliated Building Company
- ▶ Background Checks
- ▶ Bylaws
- ▶ Lottery Policy
- ▶ CMO / EMO
- ▶ Graduation Requirements
- ▶ Insurance
- ▶ Licensure Verification
- ▶ Preschool / PreK
- ▶ Required Policies
- ▶ School Calendar
- ▶ Staff Retention
- ▶ Website



Aerie Platform

- ▶ Document submission portal, reduces emails
- ▶ Sets clear expectations about deadlines and documents
- ▶ Acts as an archive
- ▶ Tasks assigned for the whole year - *note July tasks
- ▶ [Aerie Onboarding and FAQs](#)



Updates & Reminders to the Aerie Platform

- ▶ **Notifications.** Weekly notifications for items that are Past Due, Returned, and Upcoming. These happen every Monday morning. Check your Spam/Junk folders if you are not seeing them.
- ▶ **Sorting.** Remember that you can sort the column headers in your task bank so that you can see them by due date, status or alphabetically.
- ▶ **Due Dates.** The Aerie tab on the Compliance Spreadsheet has a listing of due dates for the most common tasks in the current year. **User Created task.** You may upload additional documents to OW if needed.
- ▶ **Look Ahead.** Current total tasks reflect this fiscal year only, but can change years to look forward and back in the Select School Year box. We recommended doing this in May and June to see July tasks.
- ▶ **Financials.** Reducing some redundancy: the quarterly financial tasks have been combined with the monthly financial tasks. There is now only one financial task to respond to instead of two.



Technical Assistance Calendar

- ▶ Curated a suite of resources for schools to support sound governance and compliant practices
- ▶ Responsive to feedback from schools
- ▶ Incorporates legislative updates
- ▶ Subject to changes
- ▶ [FY27 Technical Assistance Calendar](#)

The CSD will add a facilitated opportunity for schools to meet to connect around a problem of practice and lessons learned. Details will be shared once finalized.



Charter School Support, Development, and Technical Assistance

Other resources available:

- ▶ [OW Policy & Plan Guidance & Templates](#)
- ▶ [Peer contact list](#)
- ▶ [Minnesota District and Charter Data Reporting Calendar](#)
- ▶ [MDE Charter School Boot Camp](#)
- ▶ [MDE Charter School Resources](#)

Governance Specific

- ▶ [MN Open Meeting Law and Virtual Attendance Checklist](#)
- ▶ [Sounding Board](#) archive
- ▶ *Charter School Board University* [Discussion Guide](#)
- ▶ <https://mncharterboard.com/>



Reminder of 2024 Changes to Performance Frameworks / Approved Authorizing Plan

Changes to all four performance evaluations: academic, environmental education, finance, and operations

- ▶ Revised EE evaluation to focus only on student outcomes; migrated inputs to operations eval (similar to academic evaluation)
- ▶ Incorporated EE into relevant operations indicator areas to signal that EE should be part of a school's educational program rather than apart from or an additional thing that schools have to do
- ▶ Revisions to academic performance framework reflect statutory changes and lessons learned since 2020
- ▶ Changes to financial performance evaluations brings this framework in line with revisions that were recently made with the NACSA model financial performance framework and reflects changes adopted by GASB
- ▶ Significant changes to the operations performance framework, mostly focused on compliance with statute and regulation and providing greater transparency to schools and evaluators

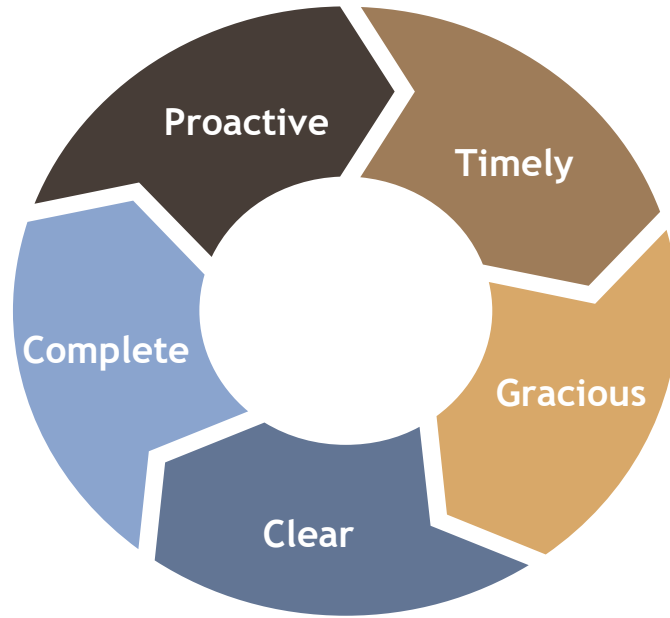


Rationale

- ▶ Provide schools with greater transparency about what it is we are actually evaluating (rather than having the rubric live in a separate document that only the evaluators see)
- ▶ Minimize opportunities for bias
- ▶ Base ratings on criteria that are less subjective and can be effectively triangulated (e.g. interviews, observations, and document review)
- ▶ Strengthen inter-rater reliability
- ▶ Create a more consistent site visit experience for schools and evaluators, focused on getting answers to specific questions and criteria in the evaluation
- ▶ Align with relevant statute or regulation, where applicable



Two-Way Communication



Thank you for your help in setting the stage for another great school year!

