



# CSSI Report Summary

## Colorado Military Academy

**Site Visit Date:** May 5-7, 2019

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## ***Part I: CSSI Overview***

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### **Overview & Process**

The school support team activities included a review of the school's essential documents, classroom observations (n=24), formal interviews with Headmaster (1), Dean of Instruction (1), Board Action Officer (1), Commandant (1), Counselor (1), Dean (1), Teachers (34), Teacher Assistants (3), Special Education Staff (3), Special Education Consultant (1), Reading Interventionist (1), Chief Financial Officer (1), Business Operations Staff (2), Board of Directors (5) and very few parents and students.

The Standards and Indicators for School Improvement rubric was the primary assessment instrument used during the visit. Prior to the site visit, the team engaged in a review of the school Model and considered best practices when observing in classrooms and interviewing all stakeholders. The team also compiled results from surveys, written documents, and other artifacts. All of these data points were triangulated as we considered the themes that emerged for this report.

The school support team's review report was based upon examination of the documents provided in the school portfolio, team experiences, and observations. The specific findings and recommendations are organized under the headings of Teaching for Learning, Organizing for Results, and Organizational Effectiveness. Each of the 10 standards for success is addressed in the following pages.

### **Teaching for Learning:**

The following Teaching for Learning Standards address standards, planning, instruction, assessment and tiered support:

#### **Standard 1:**

The school implements a curriculum that is aligned to Colorado Academic Standards and ensures rigorous, effective instructional planning.

#### **Standard 2:**

Instructional staff members provide aligned, integrated, and research-based instruction that engages students cognitively and ensures that students learn to mastery.

#### **Standard 3:**

The school uses multiple measures and assessment strategies to continuously inform instruction to meet student needs, measure student progress toward and mastery of grade-level expectations and improve instruction.



**Standard 4:**

The school implements a comprehensive system of tiered academic and behavioral support to enable students to master grade-level expectations.

**Standard 5:**

School leadership ensures the school functions as a learning organization focused on shared responsibility for student success and a rigorous cycle of teaching and learning.

**Standard 6:**

**The school functions as an effective learning community and supports a climate conducive to performance excellence for students and staff.**

**Standard 7:**

School leadership actively develops a high-quality professional staff through professional learning, supervision, evaluation, and commitment to continuous improvement.

**Standard 8:**

The school implements a mission-driven cycle of continuous improvement that optimizes learning and ensures organizational effectiveness.

**Organizational Effectiveness:**

The following Organizational Effectiveness Standards address board governance and fiscal management.

**Standard 9:**

The school board demonstrates strong leadership through its procedure to promote the school's mission, strategic planning, current knowledge of legislative issues, policy development, commitment to professional development, provision of resources, oversight/support of administrator, ability to build effective committees, and establishing networked community relationships.

**Standard 10:**

The school board demonstrates strong fiscal management and the school's practices demonstrate current and future financial health.

### *Rating System*

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To provide detailed school level information, the review team evaluates the degree to which conditions and indicators exist and the level of implementation. The rating system is explained below.

|                |   |
|----------------|---|
| <i>Level 4</i> | Developed and fully implemented on an ongoing and sustained basis |
| <i>Level 3</i> | Developed and generally implemented throughout the school         |
| <i>Level 2</i> | Initial development and/or partially implemented                  |
| <i>Level 1</i> | Initial development and/or minimal implementation                 |

Each indicator is assigned a rating from the scale above. A detailed evidence rubric is provided separately in order to allow school and board leadership to clearly understand what observations, actions, and behaviors led to our ratings.

**The Colorado Military Academy's Strong Foundations on Which to Build:**

- Stakeholders are incredibly dedicated to the vision of the school including serving the unique needs of military families and providing civilians and dependents alike military science programming (9.a.1).
- The Civil Air Patrol program is a highlight; the curriculum is on its way to being codified and it is aligned to national military standards (1.b.)
- Pearson English Language Arts and Engage New York/Zearn curriculums are high quality and are being used in some capacity.
- DIBELS is used consistently in K-2 to identify students not on grade level in reading and these students consistently receive reading intervention and additional progress monitoring.
- Since new leadership has come on board there has been significant progress made with completing Individual Education Programs (IEPs) for students in special education.
- Teachers regularly lean on each other and some grade levels have created very collaborative and supportive teams.



- Teachers regularly reported feeling support by social emotional supports such as the school counselor, the Commandant, and the dean.
- The school’s Unified Improvement Plan identifies classroom management as a major improvement strategy and provided a yearlong scope of professional development in Love and Logic.
- Instructional observations revealed pockets of effective instruction that can be leveraged to build capacity across the school.

## ***Part II: Landscape Report***

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***The Colorado Military Academy’s Detailed Report Standards 1-10 document displays the rating and supporting evidence for each standard, indicator, and sub-indicator. The Landscape Report, beginning on the next page, is a summary of the detailed report and provides the school with a “quick view” of ratings for each standard. The landscape report grounds the school in the strong foundations on which is can build as well as focused areas for improvement.***



## Part II: Landscape Report Continued

### Colorado's Standards & Indicators for Continuous School Improvement: Colorado Military Academy's Landscape Report

**Standard 1: Standards and Instructional Planning.** The school implements a curriculum that is aligned to Colorado Academic Standards and ensures rigorous, effective instructional planning.

- 1.a. Standards-Based Focus.
- 1.b. Guaranteed and Viable Curriculum.
- 1.c. Instructional Planning.

**Standard 2: Best First Instruction.** Instructional staff members provide aligned, integrated, and research-based instruction that engages students cognitively and ensures that students learn to mastery.

- 2.a. Standards-Based Instruction.
- 2.b. Instructional Context.
- 2.c. Instructional Practices.
- 2.d. Meeting Individual Needs
- 2.e. Students as Learners.

**Standard 3: Assessment Practices.** The school uses multiple measures and assessment strategies to continuously inform instruction to meet student needs, measure student progress toward and mastery of grade-level expectations and improve instruction.

- 3.a. Use of Assessment and Data.
- 3.b. Assessment for Learning
- 3.c. Assessment of Learning.

**Standard 4: Tiered Support.** The school implements a comprehensive system of tiered academic and behavioral support to enable students to master grade-level expectations.

- 4.a. System of Tiered Supports.
- 4.b. Multiple Learning Opportunities.
- 4.c. Family and Community Partnerships.

**Standard 5: Leadership.** School leadership ensures the school functions as a learning organization focused on shared responsibility for student success and a rigorous cycle of teaching and learning.

- 5.a. Expectations for Excellence.
- 5.b. Instructional Leadership.
- 5.c. School Efficiency and Effectiveness.
- 5.d. Capacity Building.
- 5.e. Knowledge and Skills

**Standard 6: Culture and Climate.** The school functions as an effective learning community and supports a climate conducive to performance excellence for students and staff.

- 6.a. Academic Expectations.
- 6.b. Inclusive Learning Environment.
- 6.c. Safe and Orderly Environment.
- 6.d. Trust and Respect.

**Standard 7: Effective Educator.** School leadership actively develops a high-quality professional staff through professional learning, supervision, evaluation, and commitment to continuous improvement.

- 7.a. High Quality Staff.
- 7.b. Supervision and Evaluation.
- 7.c. Professional Learning.

**Standard 8: Continuous Improvement.** The school implements a mission-driven cycle of continuous improvement that optimizes learning and ensures organizational effectiveness.

- 8.a. School Mission and Goals.
- 8.b. Cycle of Continuous Improvement.
- 8.c. Improvement Planning

**Standard 9 – Strong Board Governance.** The school board demonstrates strong leadership through its procedures to promote the school's mission, strategic planning, current knowledge of legislative issues, policy development, commitment to professional development, provision of resources, oversight/support of administrator, ability to build effective committees, and establishing networked community relationships.

- 9.a. Vision/Mission and Governance Structure
- 9.b. Strategic Planning
- 9.c. Policies and Legal
- 9.d. Strong Board Governance
- 9.e. Program Assessment and Renewal
- 9.f. Administrator Hiring and Evaluation
- 9.g. Meetings and Committees
- 9.h. Stakeholder Management

**Standard 10– Sound Fiscal Management.** The school board demonstrates strong fiscal management and school practices demonstrate current and future financial health.

- 10.a. Budget
- 10.b. Revenue and Program Costs
- 10.c. Stable Programming
- 10.d. Additional Revenue Resources
- 10.e. Report Requirements
- 10.f. Reserves
- 10.g. Board Responsibilities
- 10.h. Policies
- 10.i. Business Operations



## Part III: Identified Focus Areas for Standards 1-8

### Focus Area 1: Standard 5 Leadership

School leadership ensures the school functions as a learning organization focused on shared responsibility for student success and a rigorous cycle of teaching and learning.

| Leadership: School leadership ensures the school functions as a learning organization focused on shared responsibility for student success and a rigorous cycle of teaching and learning.    |                            |                                |                                |                                |
|--|----------------------------|--------------------------------|--------------------------------|--------------------------------|
| Indicators:  | Level 4: Fully Implemented | Level 3: Generally Implemented | Level 2: Partially Implemented | Level 1: Minimally Implemented |
| 5.a Expectations for Excellence: School leadership holds and communicates explicit high expectations for the performance of students and adults.   |                            |                                |                                | X                              |
| 5.b. Instructional Leadership: School leadership focuses on improving and supporting effective teaching and learning.  |                            |                                |                                | X                              |
| 5.c. School Efficiency and Effectiveness: School administrators develop and align systems, processes, and resources to establish and sustain an effective teaching and learning environment. |                            |                                |                                | X                              |
| 5.d. Capacity Building: School leadership continually builds school capacity to impact student and staff success.  |                            |                                |                                | X                              |
| 5.e. Knowledge and Skills: School leadership demonstrates knowledge and skills in the areas of academic performance, learning environment, and organizational effectiveness.                 |                            |                                |                                | X                              |

### Positive Foundations on Which to Build

#### 5.d. Capacity Building

- CMA recognized its need for capacity building and was responsive by seeking consultant support and leveraging teacher talents and skills when needed.
- Teachers consistently reported that the creation of the new the dean role this school year was very supportive.

#### 5.e. Knowledge and Skills

- CMA has hired and leveraged individuals with strong knowledge and skills in military science which has resulted in a strong, emerging Civil Air Patrol program. Military leadership has been key in the school.



## Key Area(s) for Improvement

### ***5.a Expectations for Excellence***

- CMA has not yet codified expectations for effective instruction; teachers are not held accountable to high-quality instruction through evaluation and job-embedded professional learning. For example, while teachers are required to submit lesson plans, leaders do not provide feedback or create a cycle of continuous improvement.

### ***5.b Instructional Leadership***

- CMA has not implemented an effective instructional leadership practice in which leaders continuously work with teachers to improve their instruction (e.g. coaching).

### ***5.c School Efficiency and Effectiveness***

- CMA stakeholders consistently reported that the school lacks routines and procedures for key systems; specifically, communication was regularly reported as an area for improvement.
- The change management process through the leadership transition has resulted in some disruption to school culture and functioning. For example, the process by which employees were provided termination letters while they were teaching without rationale/data or an in-person follow up appointment (only occurred if they advocated) resulted in a theme of distrust.

### ***5.d Capacity Building***

- CMA does not yet engage various stakeholders, specifically teachers, in ongoing continuous improvement efforts that result in distributive leadership and collective efficacy.

### ***5.e Knowledge and Skills***

- CMA has not yet codified the “knowledge and skills” that are required to be in each position within the school; positions are filled without a strategic hiring process.
- Stakeholder interviews revealed that there is confusion on the ability of the Dean of Instruction to supervise and evaluate instruction, and therefore, the school is creating a Teacher on Special Assignment position.

## Detailed Findings and Recommendations

The vision and mission of the Colorado Military Academy (CMA) is applaudable: serving the children and youth of those that serve. Stakeholders consistently reported the need for the model in the Colorado Springs Community; a school option that caters to the unique circumstances and needs of military families and that provides dependents and civilians alike opportunities for military science education. While the school did not meet its original enrollment goals that were very aspirational, demand for the model is displayed through the four hundred plus families that are selecting the option. Essentially, there is great value in this choice option; however, the school has struggled tremendously with mission implementation and organizational management in its two years of operation. The CSSI team has identified several recommendations for the continuous improvement of CMA which are



all bundled under a broader theme of school leadership. Document review, stakeholder interviews, and instructional observations revealed that school leadership has not approached organizational management and instructional effectiveness through a system's thinking and change management lens. This means that critical school policies and procedures (e.g. student discipline, hiring and dismissal, teacher evaluation, organizational communication, etc.) have not been codified with evidence-based practices, communicated, and systematized. A lack of clear expectations, policies and procedures and inconsistent communication has resulted in organizational mismanagement and disruption to the school's culture and climate. Teachers consistently reported a lack of clarity on decision making, a lack of expectations and instructional support, and inconsistent communication. This has resulted in some frustration, mistrust and fear; however, teachers also consistently reported that they work well with each other, have curated their own leadership within their grade level teams, and generally feel supported by their colleagues. Also, staff remain very dedicated to the mission. Additionally, some staff reported sustained trust and hope in school leadership. The school's authorizer, The Charter School Institute (CSI), provided the school with a list of 9 milestones to meet in order to retain their charter contract, two of which are to be met by July 2019. The CSSI team encourages CMA to focus on systems thinking and change management through the following steps described in this report; however, collected evidence also compels the CSSI team to strongly recommend that the CMA board consider an external management partner or turnaround agent at the behest of school improvement; this could be an Educational Management Organization (EMO), a Charter Management Organization (CMO), or perhaps the school's authorizer itself.

### **Systems Thinking and Change Management**

These strategic processes begin with gathering input and stakeholder engagement. Staff interviews consistently revealed a theme of transactional leadership in which teachers and staff are delivered decisions or are very confused about school decisions, which in turn impacts the organizational culture; it also fails to identify and harness talent and build the professional capital of teachers. For example, instructional observations displayed the school has several effective teachers to leverage. A more transformational approach such as the distributive leadership model has the power to result in not only an improved school culture but overall schoolwide effectiveness, equity in practice and accountability. The CSSI team recommends that CMA approach change management through the vehicle of School Improvement Committees (SICs) that include diverse school and community stakeholders that own, develop and monitor improvement strategies. Ideally, each SIC would have a lead and the team would meet bi-weekly or monthly; the SIC leads would meet regularly to monitor the implementation and effectiveness of their continuous improvement cycles. SICs would work through the following steps in their continuous improvement and accountability cycles:

*\*SY20 Pre-Work: Set Goal(s) and Quarterly Milestones*

*Step 1: Review Milestone and Define Success*

*Step 2: Communicate*

*Step 3: Develop, Train, Support*

*Step 4: Monitor and Adjust*

*Step 5: Celebrate Achievements Publicly*



This pre-work and five step cycle provide SICs the protocol to define, implement and improve practices over time. Quality will be augmented with more talent at the table, fill leadership gaps, and accountability will be more likely with more minds involved. The CSSI team identified specific SICs that are needed to address a few key root cause areas to the school's predicaments: Human Resources, Organizational Management, Instructional Effectiveness, School Culture and Discipline, and Special Education.

#### *Human Resources School Improvement Committee*

Leader and teacher interviews revealed concerns in regard to hiring, onboarding and dismissal practices. Teachers and staff are unaware when positions are opened and are surprised when roles are filled; there is very little stakeholder involvement in the process. Also, document review indicated that the school does not have a documented hiring process. Leaders are typically selected as opposed to recruited or hired through a competitive process. For example, interviews revealed that the new Teacher on Special Assistant was selected after a process that included a conversation but no observation of her instruction. The hiring process is limited to an interview with no performance tasks included (sample lessons, coaching simulations, data tasks, etc.). As described to the CSSI team, the recruitment and selection process does not include evidenced-based practices that places CMA in a position to acquire a diverse talent pool or to determine if candidates have the skills they need to be successful in the position. Furthermore, interviews revealed a leadership concern over unqualified and ineffective staff. Staff interviews also revealed that CMA is not yet providing onboarding and training to new employees that are hired throughout the school year. Last, interviews revealed that there has been a pattern of confusion on dismissal practice for the two years of operation which accumulated in an event of teachers receiving non-renewal letters on 4/26/19 without explanations and as they reported, without receiving any observation or meaningful evaluation and thus feedback throughout the school year. These are significant areas to attend to in that creating clear criteria and practices that are evidenced-based, transparent and equitable will result in recruiting and retaining a high-quality staff as well as an improved culture of trust. A Human Resources SIC could address this area of root cause in a project plan that creates clear criteria and qualifications for different positions, evidenced-based hiring practices, onboarding procedures, and explicit, clear and equitable procedures for identifying and addressing low-performing teachers that includes increased coaching and support. While who goes through performance planning and dismissal is confidential, it is appropriate to use a stakeholder committee to create the procedures.

#### *Organizational Management School Improvement Committee*

Another area of root cause identified through the diagnostic review is organizational management including a lack of clear roles and responsibilities for leadership members and some staff members, school wide communication, and basic operational systems such as getting a substitute. This SIC would likely want to begin by gathering input and listing out what systems are already written (i.e. handbook) and what needs to be created. This list should include clear roles and responsibilities lists for each role and structures for ongoing communication pathways (i.e. leadership to staff, school to families, teachers to families) that include explicit systems for what gets communicated, when and how. Ultimately, the staff should have a set of basic operational and communication systems in an accessible and user friendly "playbook." The goal is to ensure that operations are predictable and smooth in order for leaders, teachers, and students to operate efficiently and effectively. It would also be the key function of this SIC to gather data on fidelity of schoolwide systems (surveys, trackers, etc.), monitor and make adjustments when necessary. Systems can be prioritized as they don't have to be generated all at once, and they can be just created by admin when appropriate but monitored by the SIC.



### *School Culture and Discipline School Improvement Committee*

Document review revealed that there is a list of school rules provided in the student handbook, and many classrooms displayed a rubric with classroom culture and behavioral expectations. Document review and stakeholder interviews revealed that classroom management and student discipline was identified as an area of improvement for SY19. School leadership selected Love and Logic as the model and provided ongoing training to all teachers throughout the school year. Leader and teacher interviews also revealed that leadership did not monitor the implementation of Love and Logic in the classrooms. Classrooms were well managed in 60% of instructional observations (n = 24) collected by the CSSI Team. Leaders and teachers consistently reported that the school has not yet developed a discipline/consequence ladder for when discipline escalates past the classroom. Having a clear discipline/consequence ladder will result in consistent and equitable practices. A School Culture and Discipline SIC would ideally codify and communicate existing practices (e.g. Love and Logic), create clear and detailed discipline ladders for the classroom and for the school, train and develop the staff, and mostly importantly, work together to hold the school accountable to implementation through monitoring. When a solid base of these ladders is in place, the School Culture and Discipline SIC can consider evidenced-based restorative and trauma-informed practices that can be used at tier II and III levels.

### *Teaching and Learning School Improvement Committee*

Document review, leader and teacher interviews, and classroom observations revealed that CMA has not yet defined instructional effectiveness. Document review revealed that CMA uses an evaluation tool that has a few basic instructional effectiveness indicators embedded; however, the tool does not explicitly define instructional expectations and “look-fors” and stakeholders reported that it was only used for self-evaluations. Teachers reported they were required to submit lesson plans throughout the school year; however, they did not receive feedback. Furthermore, all teachers reported that they have not been observed, evaluated beyond self-evaluation, or coached. A Teaching and Learning SIC would attend to instructional leadership. First, instructional expectations need to be thoroughly operationalized, including the concepts of PBL and STEM, both of which take an extraordinary lift to develop and implement. The result can be a 2-sided one pager instructional tool. The Teaching and Learning SIC would ideally include the Dean of Instruction and Teachers on Special Assignment and would provide professional development and coach teachers in the indicators embedded in this instructional tool. The SIC can also monitor schoolwide effectiveness in these indicators, conducting walkthroughs and collecting data, reporting back out to staff with areas to focus on. This routine would provide a consistent eye on instruction and continuous guidance to teachers.

### *Special Education School Improvement Committee*

The CSSI team recommends that all special education teachers, aides, special service providers and the Headmaster participate in a Special Education SIC. Stakeholder interviews revealed that CMA has struggled to remain in compliance with Individual Educational Plans (IEP) timelines and expectations while operating. At the time of the CSSI visit, leaders and teachers reported that the school was in the process of completing and finalizing 45 IEP events that had been missed throughout the school year. New leadership has taken this very seriously and is working on it diligently. Leader and teacher interviews varied on the roles of special educators. It was clear that one special educator owns grades 6-9, both services and case



management; however, it was unclear how the two remaining providers share responsibilities in K-5. A couple of stakeholders reported that one position was dedicated to coordination and K-5 IEP paperwork. Also, teacher interviews revealed that CMA is not yet providing a full continuum of services in special education in that only integrated services are considered and given on IEPs. Teachers reported that they do not consider direct services because of the school's "model" and staffing capacity as opposed to it being a data-driven decision (to not consider direct services). Oversight of special education is imperative, and this team can work together with a leader to continuously monitor implementation and quality. They are encouraged to begin the year with a staffing calendar and due dates for each IEP event; due dates that include when consent is received (if applicable), when meetings are scheduled, and when paperwork is due- checking off all components along the way in a shared Google spreadsheet. The SIC can monitor this tracking document at weekly meetings. Additionally, the SIC can revisit the concept of having a particular "model" for special education inclusion and consider using data to consider and determine a range of services within a fully developed mild/moderate program. Once compliance is sustained, the Special Education SIC can set its improvement sights on services and specially designed instruction.

The CSSI team acknowledges that these recommendations, focusing on change management through the vehicle of 5 key School Improvement Committees, are robust. The team struggled to parcel down from here in the prioritization process, believing that all are key areas of focus. The team encourages CMA to assign SIC leadership to the following positions: Headmaster, Dean of Instruction, Dean of Students, and Teachers on Special Assessment. Ensuring that these leads work together for integration and ongoing school wide communication. Not only is approaching school improvement through teaming structures an evidenced-based practice, with the capacity of current contracted leadership and the sizable lift, systemic improvement will necessitate leveraging talent and distributing leadership. This would in turn build a strong culture of collective efficacy, improve school culture, share the workload, upgrade communication and ensure accountability. Ultimately, the CSSI team does recommend that CMA seek external partnership and support in the school improvement process; there is a community that is deeply invested in the model and the success of the Colorado Military Academy.



## Part IV: Identified Focus Areas for Standards 9-10

### Focus Area 1: Standard 9 Strong Board Governance

**Strong Board Governance:** The school board demonstrates strong leadership through its procedures to promote the school’s mission, strategic planning, current knowledge of legislative issues, policy development, commitment to professional development, provisions of resources, oversight/support of administrator, ability to build effective committees, and establishing networked community relationships.

| Strong Board Governance: The school board demonstrates strong leadership through its procedures to promote the school’s mission, strategic planning, current knowledge of legislative issues, policy development, commitment to professional development, provisions of resources, oversight/support of administrator, ability to build effective committees, and establish networked community relationships. |                                   |                                       |                                       |                                       |
|--|-----------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| <i>Indicators:</i>   | <i>Level 4: Fully Implemented</i> | <i>Level 3: Generally Implemented</i> | <i>Level 2: Partially Implemented</i> | <i>Level 1: Minimally Implemented</i> |
| 9.a Mission/Vision and Governance Structure: The Governing Board promotes the vision and mission of the school through a strong governance structure.  |                                   |                                       |                                       | X                                     |
| 9.b Strategic Planning: The Governing Board promotes the vision of the school through strategic planning.  |                                   |                                       |                                       | X                                     |
| 9.c Policies and Legal: The Governing Board policies adhere to legal obligations as a public entity.   |                                   |                                       |                                       | X                                     |
| 9.d Strong Board Governance: The Governing Board engages in quality, needs-based professional development.   |                                   |                                       |                                       | X                                     |
| 9.e Program Assessment and Renewal: The Governing Board provides guidance in program assessment and renewal processes.   |                                   |                                       |                                       | X                                     |
| 9.f Administration Hiring and Evaluation: The Governing Board has a clear plan for hiring, retaining, supporting, and evaluating the lead administrator.   |                                   |                                       |                                       | X                                     |
| 9.g Board Meetings and Committees: The Governing Board demonstrates effective use of meetings and committees.  |                                   |                                       |                                       | X                                     |
| 9.h Stakeholder Management: The governing board supports the mission/vision of the school by securing strong relationships with internal and external stakeholders.  |                                   |                                       |                                       | X                                     |



### Standard 10 Sound Fiscal Management

**Sound Fiscal Management:** The school board demonstrates strong fiscal management and school practices demonstrate current and future financial health.

| <b>Sound Fiscal Management: The school board demonstrates strong fiscal management and school practices demonstrate current and future financial health.</b>                           |                                   |                                       |                                       |                                       |
|--|-----------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| <i>Indicators:</i>   | <i>Level 4: Fully Implemented</i> | <i>Level 3: Generally Implemented</i> | <i>Level 2: Partially Implemented</i> | <i>Level 1: Minimally Implemented</i> |
| 10.a The Governing Board and administration gather input to develop short-term and long-term budgets and make effective use of sound budgeting practices.                              |                                   |                                       |                                       | X                                     |
| 10.b Leadership uses realistic revenue and program costs in the budget.  |                                   |                                       |                                       | X                                     |
| 10.c The school has enough revenue to ensure stable programming  |                                   |                                       |                                       | X                                     |
| 10.d The school has developed other resources to achieve additional strategic priorities and can increase revenue if a shortfall occurs.   |                                   |                                       |                                       | X                                     |
| 10.e The school understands and complies with reporting requirements of the state and charter authorizer.  |                                   |                                       | X                                     |                                       |
| 10.f The school has access to reserves or can raise cash if a budget shortfall occurs or to finance growth.  |                                   |                                       | X                                     |                                       |
| 10.g The Governing Board and administrators hold themselves responsible for the school's financial stability and integrity.  |                                   |                                       | X                                     |                                       |
| 10.h The Governing Board has adopted policies that ensure financial health and a strong system for the timely, accurate tracking and recording of all financial data and transactions. |                                   |                                       |                                       | X                                     |
| 10.i The school has established and maintains procedures for accurate and appropriate business operations.   |                                   |                                       | X                                     |                                       |

### Positive Foundations on Which to Build

#### *Standard 9.c.3 and 9.g.1 - Sunshine Laws & Meetings*

- The CMA board agendas are posted publicly in a timely manner and meeting minutes reflect that open meetings requirements are followed. Executive sessions are cited, and hand-written minutes are taken.
- Overall, board members report that meetings are efficient and productive.

***Standard 9.c.4 and 9.c.7- Board Professionalism & Legal***

- The CMA board members are well-respected community members who have experience serving in the role.
- The board sought legal advice and took action when issues with school leadership were discovered.

***Standard 10.e.1 and e.3 - Audit & Financial Transparency***

- An independent audit was performed for the year ending June 30, 2018 and showed the appropriate TABOR reserve. Action taken to move funds from the building corporation to the school enabled the school to end the year with a positive fund balance.
- CMA is in full compliance with the requirements of the Financial Transparency Act with annual budgets, audit, financials, salary policy, accounts payable register posted on the website.

**Key Area(s) for Improvement*****Standard 9.b.1 and 9.e.3 – Strategic Planning & Data Driven Decision-Making***

- The CMA board has not yet engaged in a regular strategic planning process that leads to key objectives and deliverables linked to the school’s mission while also providing a clear roadmap for implementation that the school’s leadership could use to create their own performance goals.
- The board does not currently review a data dashboard or use multiple sources of reliable data to make decisions about programming or facility.

***Standard 9.f.3 and 9.f.4 – Administrative Hiring & Evaluation***

- The board does not currently have a detailed and realistic job description for the leadership roles in the school. A rigorous and competitive hiring and succession plan for securing a quality lead administrator is needed.
- The board also needs to develop an evaluation process for the school leader that includes mutually agreed upon performance goals.

***Standard 10.b.2 and 10.b.4 – Revenue Projections & Organizational Structure***

- CMA’s projections for year one enrollment were inaccurate resulting in substantial shortfall in revenue. Conservative enrollment projections based on multiple sources of realistic internal and external data could provide the revenue stability needed for the school to recover.
- A documented organizational structure and related job descriptions are needed to fully understand and implement the leadership roles in the school, how leaders and staff work together, and what the supervision load is for each.

***Standard 10.h.1, 10.h.2 and 10.i.6 – Budget/Fiscal Management Policies & HR Practices***

- There was no evidence of budget policies provided to the review team. Adopting a comprehensive set of policies outlining a collaborative process for budget development, revision, approval and submission to the authorizer is charter school governing board best practice.



- Fiscal management policies related to purchases, approvals, and regular monitoring of spending against budget were not reported to or shared with the review team.
- Employee files are not monitored for completeness with a checklist or other system and it is not clear that it would be known if something was missing from either office. Interviews revealed that multiple employees were hired without orientation, onboarding, or safety and risk management training.

### Detailed Findings and Recommendations:

It is encouraging to see a brand-new charter school open with a unique military-focused mission serving nearly 500 students. Given the challenging circumstances with leadership and finance, the overall culture of the school is welcoming to outsiders as the review team was met with kindness by students and staff. The board's members are well-respected members of the community and each expressed a strong passion for the mission and vision of the school as well as the demand for a program like Colorado Military Academy has.

Board members each have experience working on non-profit boards and bring many years of expertise in community issues and higher education. Interviews revealed that board meetings are efficient and Sunshine Law and Open Meetings requirements are observed. It was reported that executive session minutes are taken by hand, which is acceptable, however practices should be reviewed by referencing the following website: <https://www.casb.org/Page/66>. Executive session minutes can be voice recordings and should be kept for 90 days typically somewhere at the school. Meeting agendas should include the appropriate statutory citation next to the executive session agenda item. A list of Colorado Open Meetings Law citations is below.

Executive Session Purposes: The specific grounds for which a charter school board may meet in executive session are listed in C.R.S. §24-6-402(4) as follows:

- C.R.S. §24-6-402(4)(a): Discussions regarding acquisition, transfer, or sale of property;
- C.R.S. §24-6-402(4)(b): Conferences with an attorney to receive legal advice;
- C.R.S. §24-6-402(4)(c): Matters required to be kept confidential by state or federal law (e.g., student records);
- C.R.S. §24-6-402(4)(d): Security arrangements or investigations;
- C.R.S. §24-6-402(4)(e): Determining contract negotiation strategies;
- C.R.S. §24-6-402(4)(f): Personnel matters, unless the person(s) being discussed request an open meeting (Note that "personnel matters" does not include discussions concerning a member of the charter school board or the appointment of a person to fill a vacancy on the board. Nor does the topic include discussion of general personnel policies like salary schedules. The exception occurs only when an individual employee or group of employees are discussed.);
- C.R.S. §24-6-402(4)(g): Consideration of documents protected from disclosure under the Open Records Act per C.R.S. §24-72-202(6.5) (for more on this see the discussion of that act below); or



- C.R.S. §24-6-402(4)(h): Discussion of individual students where public discussion would adversely affect the student(s) involved.

Although the school is facing significant challenges related to its hiring choices in school leadership, and engagement in a restrictive facility financing arrangement, board members have taken an active role in identifying consultants to help find solutions to the issues. It is recommended that the board consult legal counsel to be certain that the appropriate laws, rules and regulations related to 1099 employees are followed (<https://www.irs.gov/businesses/small-businesses-self-employed/independent-contractor-self-employed-or-employee>).

Colorado Military Academy's governing board must take an active role in developing a short and long-term strategic plan that provides a roadmap of goals and objectives leading the school toward sound operational capacity. This plan should be informed by multiple sources of data including vertical K-12 mission alignment, student performance, realistic enrollment growth projections, facility financing options, and stakeholder input. To date, the board reviews cash flow and enrollment data closely, however there are no policies and procedures in place that provide a check-and-balance for financial practices which creates risk for financial mismanagement. The board relies on one-two people to report financial performance and this led to the troubling discovery that the school was operating at a loss. Operational policies and procedures that the board should develop and adopt include:

- Use of purchase orders for pre-approval of all purchases
- Clearly limit and define who has authority to approve purchases
- Define which member of staff is allowed to sign contracts
- Implement a budget process that allows staff to give input and to understand the document
- Distribute a monthly budget-to-actual statement to all management staff
- Write a 'Charter' for the Finance Committee that defines duties and responsibilities
- Clarify the responsibilities of Business Office and Human Resources
- Implement an employee on-boarding and termination process
- Clarify when and by whom over-time will be approved

In addition, the board should spend time developing a rigorous and competitive hiring and evaluation process to ensure the school's leadership is strong. To do this, it is recommended that the board review the organizational structure and develop an organizational chart that clearly defines lines of authority and relationships between departments and across teams. Also, leadership roles(s) should have detailed job descriptions that can translate and align to a performance evaluation that is conducted regularly by the board. Last, the board is encouraged to do a needs assessment for board make-up and recruit new members that have the capacity to engage and provide high levels of oversight through the school improvement process; this could alleviate the need for a "Board Action Officer," thus diverting the resource allocation to school management.



## ***Part V: Conclusion***

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The CSSI team extends its assurances that the information obtained through the evaluation process will remain confidential. If your authorizer requests a copy of the report, it will be provided. We also provide assurances that the team strived for objectivity in its findings. Most importantly, we commend The Colorado Military Academy (CMA) for its willingness to undergo an evaluation and for its desire to grow and become a great school. Once the school has reviewed and discussed this report in detail, as questions arise, please feel free to contact Bill Kottenstette at the CDE Schools of Choice Unit: [kottenstette\\_b@cde.state.co.us](mailto:kottenstette_b@cde.state.co.us)

### **Resources that may help as you continue your conversations:**

- The Colorado Department of Education’s Webpage has various resources:
  - Schools of Choice Unit: <http://www.cde.state.co.us/cdechart>
  - CDE MTSS Information: <http://www.cde.state.co.us/mtss>
  - Educator Effectiveness: <http://www.cde.state.co.us/educatoreffectiveness>
  - Standards and Instruction: <http://www.cde.state.co.us/standardsandinstruction>
  - Special Education: <http://www.cde.state.co.us/cdesped>
- The League of Charter Schools: <http://coloradoleague.org/>