

Portland Public Schools  
Annual Performance Framework and Report

Opal Charter School  
2019-20 School Year

Submitted by:

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## **Introduction**

Charter schools in Oregon are defined in statute as “...a legitimate avenue for parents, educators and community members to take responsible risks to create new, innovative and more flexible ways of educating children within the public school system. The Legislative Assembly seeks to create an atmosphere in Oregon’s public school system where research and development of new learning opportunities are actively pursued.” (ORS 338.015)

The charter schools sponsored by Portland Public Schools provide educational options for students and families as well as diversity of professional opportunities for school employees. While the district provides oversight and support to its sponsored charters, each charter school is an independent, nonprofit organization that has autonomy over its mission, strategic planning, budget, hiring, policies, and the development and implementation of its educational program.

Portland Public Schools is responsible for maintaining high standards for its sponsored charter schools, and for ensuring that charter schools are compliant with all applicable laws, that their academic programs are successful, they are financially viable, and their organizations are effective and responsibly managed. The district balances oversight with an understanding of the independence and autonomy afforded public charter schools by law.

In so doing, PPS has established the following performance framework, which is informed by best practice from the Core Performance Framework and Guidance developed by the National Association of Charter School Authorizers (NACSA). This performance framework is designed to measure each charter school’s academic, financial, and organizational performance, and to “...guide practice, assess progress, and inform decision-making over the course of the charter term and at renewal.”<sup>1</sup>

Because each charter school’s story and perspective on its own performance is critical to a balanced evaluation process, each measure includes space for narrative explanation and/or further description from both the district and the charter school. It is our hope and goal that PPS and the charter school will fully engage in the process of program evaluation each year and at the renewal period, and that this process contributes to the continuous improvement of each charter school and the PPS Charter Schools Office.

Tara O’Neil  
Program Director, Charter Schools  
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<sup>1</sup> From NACSA’s Core Performance Framework and Guidance.

## **Academic performance: data elements and sources**

The purpose of the Academic Performance section of the Annual Performance Framework and Report is to evaluate whether or not the charter school's educational program is showing success with its students.

Many of the indicators for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance", while the performance targets and ratings are aligned with the targets and ratings in the Oregon Report Card.

***Note: The Oregon Department of Education (ODE) will not assign summative, overall ratings to schools on the redesigned Oregon Report Card beginning in the 2017-18 school year. Instead schools are rated on up to 6 (for k-8) or 9 (for HS) separate indicators.***

The following data elements and sources are used to complete the Academic Performance analysis:

- The charter school's Oregon Report Card
- The charter school's State Assessment results
- The charter school's contract
- The district's Oregon Report Card
- The district's State Assessment results
- Performance and growth information for comparison schools, as defined by the Oregon Department of Education
- The Administrator's Dashboard

Additionally for high schools only:

- The school's graduation rate
- The district's graduation rate
- The school's completion rate
- The district's completion rate
- The school's freshmen on track rate
- The district's freshmen on track rate
- The graduation, completion, and dropout rates of comparison schools, if applicable, as defined by ODE

Additionally for grades 6-12 only:

- The charter school's alignment to Common Core State Standards as evidenced by course syllabi, course descriptions, curriculum alignments, etc.

***Note on Statewide Report Cards for 2019-20:*** The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All. The profiles present all available data not impacted by the state's response to COVID-19. **As a result, there is no comparative academic performance data to report for charter schools in the 2019-20 school year.** Page 14 begins sections on Financial and Organizational performance for the 2019-20 school year.

*The 3-year Trend Performance Summary chart at the end of this document will not include summary data from 2019-20 in the Academic section, and instead will retain the data from the most recent 3 years of available academic performance data. The Financial and Organizational sections will include summary data from the 2019-20 school year.*

# Academic Performance

## 1. Oregon School Rating System

<b>Measure 1a</b> Is the school meeting acceptable standards according to the Oregon State school rating system?
<b>Exceeds standard:</b> <input type="checkbox"/> School received the highest rating from the state accountability system
<b>Meets standard:</b> <input type="checkbox"/> School received a passing rating according to the state accountability system
<b>Does not meet standard:</b> <input type="checkbox"/> School did not receive passing rating according to the state accountability system
<b>Falls far below standard:</b> <input type="checkbox"/> School identified for intervention or considered failing by the state accountability system
District comments/recommendations: <b>N/A, the current version of the Oregon Report Card no longer gives single ratings to schools</b>
School comments:

<b>Measure 1b</b> Is the school meeting state designation expectations as set forth by the state and federal accountability system?
<b>Exceeds standard:</b> <input type="checkbox"/> School was identified as meeting long term academic accountability indicators as defined by Oregon's ESEA Plan
<b>Meets standard:</b> <input checked="" type="checkbox"/> School was identified as meeting interim targets of academic accountability indicators as defined by Oregon's ESEA Plan
<b>Does not meet standard:</b> <input type="checkbox"/> School was identified as falling below the interim target but not in the lowest 10% of schools as defined by Oregon's ESEA Plan
<b>Falls far below standard:</b> <input type="checkbox"/> School was identified as in the lowest 10% of schools as defined by Oregon's ESEA Plan
District comments/recommendations: The school has not been identified for Targeted (TSI) or Comprehensive (CSI) Supports.
School comments:

**Measure 1c**

How are **All Students Total (3-5)** and **by Grade Level** achieving on state assessments in English Language Arts (ELA) compared to students in the district?

**E=Exceeds standard:** School's average achievement rate exceeds the average district performance of students in the same grades by at least 10%

**M=Meets standard:** School's average achievement rate meets or exceeds the average district performance of students in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average achievement rate is less than the average district performance of students in the same grades by 1-10%

**F= Falls far below standard:** School's average achievement rate is less than the average district performance of students in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1d**

How are **All Students Total (3-5)** and **by Grade Level** achieving on state assessments in MATHEMATICS compared to students in the district?

**E=Exceeds standard:** School's average achievement rate exceeds the average district performance of students in the same grades by at least 10%

**M=Meets standard:** School's average achievement rate meets or exceeds the average district performance of students in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average achievement rate is less than the average district performance of students in the same grades by 1-10%

**F= Falls far below standard:** School's average achievement rate is less than the average district performance of students in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1e**

How are **Students of Special Populations** achieving on state assessments in English Language Arts (ELA) compared to the **Students of Special Populations** in the district?

**E=Exceeds standard:** School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%

**M=Meets standard:** School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%

**F= Falls far below standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

**Measure 1f**

How are **Students of Special Populations** achieving on state assessments in MATHEMATICS compared to the **Students of Special Populations** in the district?

**E=Exceeds standard:** School's average subgroup achievement rate exceeds the average district performance of students in the same subgroup in the same grades by at least 10%

**M=Meets standard:** School's average subgroup achievement rate meets or exceeds the average district performance of students in the same subgroup in the same grades by up to 10% (or within variance of one student)

**D=Does not meet standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by 1-10%

**F= Falls far below standard:** School's average subgroup achievement rate is less than the average district performance of students in the same subgroup in the same grades by more than 10%

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

## 2. Student Academic Growth

### Measure 2a

Are students making expected annual academic growth in English Language Arts (ELA) compared to their peers? (Combined Median Growth Percentile)

#### **E=Exceeds standard:**

Combined median growth percentile of 55 or more

#### **M=Meets standard:**

Combined median growth percentile of between 45 and 54.9 (or within variance of one student)

#### **D=Does not meet standard:**

Combined median growth percentile of between 40 and 44.9

#### **F=Falls far below standard:**

Combined median growth percentile of less than 40

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

### Measure 2b

Are students making expected annual academic growth in MATH compared to their peers? (Combined Median Growth Percentile)

#### **E=Exceeds standard:**

Combined median growth percentile of 55 or more

#### **M=Meets standard:**

Combined median growth percentile of between 45 and 54.9 (or within variance of one student)

#### **D=Does not meet standard:**

Combined median growth percentile of between 40 and 44.9

#### **F=Falls far below standard:**

Combined median growth percentile of less than 40

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

### 3. Subgroup Growth

<b>Measure 3a</b> Is the school increasing academic performance over time in English Language Arts for <b>Students of Special Populations?</b> (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> Combined median growth percentile of between 40 and 44.9
<b>F=Falls far below standard:</b> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:

<b>Measure 3b</b> Is the school increasing academic performance over time in MATH for <b>Students of Special Populations?</b> (Combined Median Growth Percentile)
<b>E=Exceeds standard:</b> Combined median growth percentile of 55 or more
<b>M=Meets standard:</b> Combined median growth percentile of between 45 and 54.9 (or within variance of one student)
<b>D=Does not meet standard:</b> Combined median growth percentile of between 40 and 44.9
<b>F=Falls far below standard:</b> Combined median growth percentile of less than 40
Data: <b>NA</b> <i>The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.</i>
School comments:



#### 4. Local Performance Assessments

<b>Measure 4</b> Describe your school's Local Performance Assessments in the fields below.			
<b>What Local Performance Assessment are you using?</b>	<b>To what grades are you administering the Local Performance Assessment?</b>	<b>What subjects are you assessing through the Local Performance Assessment?</b>	<b>How are you documenting your administration of the Local Performance Assessment?</b>
Reading Developmental Continuum	K-5	Reading	Individual student assessment in file
Development Reading Assessment (DRA)	K-5	Reading	Individual student assessment in file
Spelling Inventory	K-5	Spelling	Individual student assessment in file
Writing Developmental Continuum	K-5	Writing	Individual student assessment in file
Work Sample	3-5	Writing	Individual student assessment in file
Work Sample	3-5	Speaking	Individual student assessment in file
Mathematical Landscape	K-5	Math	Individual student assessment in file <ul style="list-style-type: none"> <li>• Big ideas</li> <li>• Models</li> <li>• Strategies</li> </ul>
Work Sample, math poster	3-5	Math	Individual student assessment in file <ul style="list-style-type: none"> <li>• Computation</li> <li>• Tools for thinking</li> <li>• Big ideas</li> </ul>
Work Sample	3-5	Science	Individual student assessment in file

**Measure 4 (Continued)**

Describe your school's Local Performance Assessments in the fields below.

<b>What Local Performance Assessment are you using?</b>	<b>To what grades are you administering the Local Performance Assessment?</b>	<b>What subjects are you assessing through the Local Performance Assessment?</b>	<b>How are you documenting your administration of the Local Performance Assessment?</b>
Opal School Goals and Expectations	K-5	<ul style="list-style-type: none"> <li>• Discover, cultivate and express the joy and wonder of learning</li> <li>• Develop an understanding and curiosity about multiple points of view</li> <li>• Have value and empathy for experiences and perspectives different from one's own</li> <li>• Collaborate with others to construct ideas and create new knowledge</li> <li>• Develop an understanding of our interdependent relationship with the natural world</li> <li>• Take action as mindful citizens who care about contributing to a future that acknowledges living systems as an integrated whole</li> <li>• Develop strategies that contribute to the quality of the community by having a keen sense of place, identity and belonging while respecting the rights and identities of others</li> <li>• Read the world: explore ideas and relationships; make connections between known and unknown information</li> <li>• Use the written and spoken word with increasing proficiency to communicate ideas, relationships and understandings</li> <li>• Uncover and communicate observations, questions, theories and ideas through skillful and imaginative uses of the languages of the arts and sciences, including mathematics</li> <li>• Develop an appreciation of and capacity for accuracy, elegant design and efficiency</li> </ul>	<p>Opal School Goals and Expectations are assessed continually through anecdotal notes, analyzing student work samples, narrative, transcription of dialogue, documentation panels, etc.</p> <p>This growth is shared at our Fall parent-teacher conferences and Spring student-led conferences.</p>
District comments/recommendations:			

## 5. Student Attendance

### Measure 5

What percentage of students at the charter school are identified as Regular Attenders (attending more than 90% of their enrolled days)?

#### **E=Exceeds standard:**

- School's percentage of Regular Attenders meets or exceeds the long term goal of 93% as set by the Oregon Department of Education

#### **M=Meets standard:**

- School's percentage of Regular Attenders meets or exceeds the Level 3 indicator by grade level as set by the Oregon Department of Education (K-5, 85%; 6-8, 83%; 9-10, 78%)

#### **D=Does not meet standard:**

- School's percentage of Regular Attenders does not meet the Level 3 indicator by grade level but is not below the 10<sup>th</sup> percentile of performance for the grade level group

#### **F=Falls far below standard:**

- School's percentage of Regular Attenders is below the 10<sup>th</sup> percentile of performance for the grade level group

Data: **NA**

*The Oregon Department of Education (ODE) School and District profiles do not include statewide assessments data, class size data, or attendance data as a result of the necessary COVID-19 related statewide school closures and the implementation of Distance Learning for All.*

School comments:

(Measures 6 and 7 omitted, apply to middle and high schools only)

## 8. School goals and recommendations (academic)

### Measure 8a

Did the school meet the academic goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	How or why not? (School response) Include any professional development implemented to support this goal.
Each student's academic growth in math will meet the goal set for that student during Fall formative assessments.	NA	Implementation of Distance Learning for All
Demonstrate growth toward social justice standards.	Yes	Based on student work through COVID closure
Increase the number of students who attend school regularly from 89% to 90%.	No	

### Measure 8b

In school year 2019-20, did the school implement the academic recommendations from the district in the 2018-19 annual performance report (if any)?

Recommendation from the district	Recommendation implemented? (School response)	How or why not? (School response) Include any professional development implemented to support this goal.
In the 2018-19 Report, the District recommended that Opal School make an effort to increase its participation rate to increase the statistical validity of testing data.	NA	State testing was cancelled for 2019-20
District recommended Opal School investigate effectiveness of its k-3 mathematics instruction, as the 3 <sup>rd</sup> grade test data is the only level showing results lower than District average.	Yes	Opal School increased instruction time for mathematics, obtained additional (newly published) contexts for mathematics aligned with our approach, and invested in professional development for teachers.

**Measure 8c**

Based on the 2019-20 school year data presented in this report, will the school add any academic goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

<b>Goal added to Plan:</b>				
Instructional Strategies	Rationale	Professional Development	Assess Progress	Use of Resources
N/A				
N/A				

## **Financial Performance: data elements and sources**

The purpose of the Financial Performance section of the Annual Performance Framework and Report is to evaluate whether or not the charter school is financially viable.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Financial Performance analysis:

- The charter school's contract
- The charter school's audited balance sheet and notes for the last three years
- The charter school's projected enrollment and actual enrollment
- The charter school's board-adopted budget
- The charter school's audited income statement and audited cash flow statement
- Annual principal and interest obligations
- Quarterly financial statements, including budget-to-actuals, profit and loss, balance sheet

# Financial Performance

## 9. Near-Term Measures

<b>Measure 9a</b> Current ratio: Current assets divided by current liabilities
<b>Meets standard:</b> <input checked="" type="checkbox"/> Current ratio is greater than or equal to 1.1
<b>Does not meet standard:</b> <input type="checkbox"/> Current ratio is between .9 and 1.0 or equals 1.0
<b>Falls far below standard:</b> <input type="checkbox"/> Current ratio is less than or equal to .9
District comments/recommendations: Current ratio is 3.37, meets standard
School comments:

<b>Measure 9b</b> Unrestricted days cash: Unrestricted cash divided by (total expenses minus depreciation expense) / 365)
<b>Meets standard:</b> <input checked="" type="checkbox"/> 60 days cash -OR- <input type="checkbox"/> Between 30 and 60 days cash and one-year trend is positive
<b>Does not meet standard:</b> <input type="checkbox"/> Between 15 and 30 days cash -OR- <input type="checkbox"/> Between 30 and 60 days cash and one-year trend is negative
<b>Falls far below standard:</b> <input type="checkbox"/> Fewer than 15 days cash
District comments/recommendations: School has 150.3 days unrestricted cash, meets standard
School comments:

**Measure 9c**

Enrollment variance: actual enrollment divided by enrollment projection in most recent charter school board-approved budget

**Meets standard:**

Enrollment variance equals or exceeds 95% in the most recent year

**Does not meet standard:**

Enrollment variance is between 85-95% in the most recent year

**Falls far below standard:**

Enrollment variance is less than 85% in the most recent year

District comments/recommendations:

Enrollment variance is 1.01, meets standard

School comments:

**Measure 9d**

Default

**Meets standard:**

School is not in default of loan covenant(s) and/or is not delinquent with debt service payments

**Falls far below standard:**

School is in default of loan covenant(s) and/or is delinquent with debt service payments

District comments/recommendations:

Not in default, meets standard

School comments:



## 10. Sustainability Measures

### Measure 10a

Total Margin: Net income divided by total revenue

Aggregated total margin: Total 3-year net income divided by total 3-year revenues

#### **Meets standard:**

- Aggregated 3-year total margin is positive and the most recent year total margin is positive
- OR-
- Aggregated 3-year total margin is greater than -1.5%, the trend is positive for the last 2 years, and the most recent year total margin is positive

#### **Does not meet standard:**

- Aggregated 3-year total margin is greater than -1.5%, but trend does not “meet standard” (above)

#### **Falls far below standard:**

- Aggregated three-year total margin is less than or equal to -1.5%
- OR-
- The most recent year total margin is less than -10%

District comments/recommendations:

Aggregated 3-year total margin is -1.54%, total margin is -9.95%; does not meet standard.

The aggregated 3-yr total margin as well as the most recent year total margin do not meet standard, and there have been three years of losses (with pension effects removed). Opal School has a unique financial arrangement with the Portland Children’s Museum, without which the school could not support operations with current enrollment. **District recommends** Opal’s Board should continue to monitor the school’s cash flow and budget, as well as review the school’s quarterly financial reports and enrollment trends.

School comments:

Portland Children’s Museum received a federal Payroll Protection Program loan in 2019-20, and a portion of this loan is forgivable under certain conditions. Some payroll expenses of the organization that are charged as overhead expenses to Opal Charter School met the conditions for forgiveness, but this amount was not reflected in 2019-20 as a government grant (income), because the PPP forgiveness was not approved until Fall of 2020. If the government grant had been accrued in 2019-20, Opal Charter School’s financial statements would show a break-even result.

**Measure 10b**

Debt to asset ratio: Total liabilities divided by total assets

**Meets standard:**

Debt-to-asset ratio is less than 0.9

**Does not meet standard:**

Debt-to-asset ratio is between 0.9 and 1.0

**Falls far below standard:**

Debt-to-asset ratio is greater than 1.0

District comments/recommendations:

Debt-to-asset ratio is 0.11, meets standard

School comments:

**Measure 10c**

Cash flow:  
Multi-year cash flow = Year 3 total cash - Year 1 total cash  
One-year cash flow = Year 2 total cash - Year 1 total cash

**Meets standard:**

- Multi-year cumulative cash flow is positive and cash flow is positive each year
- OR-
- Multi-year cumulative cash flow is positive, cash flow is positive in one of two years, and cash flow in the most recent year is positive

**Does not meet standard:**

- Multi-year cumulative cash flow is positive, but trend does not “meet standard” (above)

**Falls far below standard:**

- Multi-year cumulative cash flow is negative

District comments/recommendations:

Multi-year cash flow is \$81,099 (meets standard) and one-year cash flow is -\$80,122 (does not meet standard); overall does not meet standard. Cash and General Fund Ending Fund Balance are still healthy. **District recommends** Opal’s Board should continue to monitor the school’s cash flow and budget, as well as review the school’s quarterly financial reports and enrollment trends.

School comments:

As a program of the Portland Children’s Museum, Opal School continues efforts to budget and control the use and expense of centralize services and core mission support.

**Measure 10d**

Debt service coverage ratio: (net income + depreciation + interest expense) / (annual principal, interest, and lease payments)

**Meets standard:**

- Debt service coverage ratio is equal to or exceeds 1.1

**Does not meet standard:**

- Debt service coverage ratio is less than 1.1

District comments/recommendations:

Debt service coverage ratio is -0.84, does not meet NACSA recommended standard, however the school carries no debt and has maintained a healthy cash balance (150 days unrestricted days cash). In addition, the school’s facility is effectively donated so there are few, if any, costs associated with occupancy. This measure is not of current concern, though bears watching if agreements regarding facility use change.

School comments:

The debt service coverage ratio is used to compare cashflow available to meet interest and principal payments. Opal School’s lease payments are an in kind calculation, and do not depend on cashflow. Opal School does not carry debt.

## 11. School goals and recommendations (financial)

### Measure 11a

Did the school meet the financial goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	Why or why not? (School response)
Work with Portland Children's Museum to develop budget agreement and transparency for services and costs charged to Opal School	No	COVID

### Measure 11b

In school year 2019-20, did the school implement the financial recommendations from the district in the 2018-19 annual performance report (if any)?

Recommendation from the district	Recommendation implemented? (School response)	Why or why not? (School response)
No financial recommendation was made by District in 2018-19 report, there were no financial concerns. (Financial performance measures from 2018-19 can be found on p. 34, 3-yr Trend Summary.)		

### Measure 11c

Based on the 2019-20 school year data presented in this report, will the school add any financial goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

Goal added to Plan:				
Practical Strategies	Rationale	Professional Development	Assess Progress	Use of Resources

## **Organizational Performance: data elements and sources**

The purpose of the Organizational Performance section of the Annual Report is to evaluate whether or not the charter school as an organization is effectively governed and well run.

Many of the indicators, performance targets, and ratings for this section are adopted from the National Association of Charter School Authorizers' "Core Performance Framework and Guidance".

The following data elements and sources are used to complete the Organizational Performance analysis:

- Site visit observations (both formal and informal)
- The charter school's contract
- Required reporting by the charter school, including all deliverables
- The school's adherence to deliverable and reporting due dates
- Feedback from parents, students, charter school staff, and other community stakeholders
- Synergy or other student information system
- The Administrators Dashboard
- The charter school's internal accountability systems
- Student enrollment forms
- The charter school's adopted board policies
- The charter school's parent/student/staff handbooks
- TSPC
- Assurances by the charter school that it is compliant with all applicable requirements

# Organizational Performance

## 12. Education Program

<b>Measure 12a</b> Is the school implementing the material terms of the education program as defined in the current charter contract?
<b>Meets standard:</b> <input checked="" type="checkbox"/> The school implemented the material terms of the education program in all material aspects and the education program in operation reflects the material terms as defined in the charter contract, or the school has gained approval for a modification to the material terms.
<b>Does not meet standard:</b> <input type="checkbox"/> The school failed to implement the material terms of the education program in all material aspects and the education program in operation does not reflect the material terms as defined in the charter contract, or the schools implemented a modification to the material terms without approval and/or a mutually agreeable amendment to the contract.
District comments/recommendations: The school materially complies with this standard.
School comments:

<b>Measure 12b</b> Is the school complying with applicable education requirements?
<b>Meets standard:</b> <input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to education requirements, including but not limited to: <ul style="list-style-type: none"><li>• Instructional days and/or minutes requirements</li><li>• Graduation and promotion requirements</li><li>• Content standards, including Common Core State Standards</li><li>• The administration of state assessments</li><li>• Implementation of mandated programming as a result of state or federal funding</li></ul>
<b>Does not meet standard:</b> <input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to education requirements, including, but not limited to: <ul style="list-style-type: none"><li>• Instructional days and/or minutes requirements</li><li>• Graduation and promotion requirements</li><li>• Content standards, including Common Core State Standards</li><li>• The administration of state assessments</li><li>• Implementation of mandated programming as a result of state or federal funding</li></ul>
District comments/recommendations: The school materially complies with this standard.
School comments:

**Measure 12c**

Is the school protecting the rights of students with disabilities?

**Meets standard:**

Consistent with the school's status as a school in a district LEA, the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

**Does not meet standard:**

Consistent with the school's status as a school in a district LEA, the school was materially out of compliance with one or more applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including, but not limited to:

- Equitable access and opportunity to enroll
- Identification and referral
- Appropriate involvement with development and implementation of Individualized Education Plans, and appropriate development of Section 504 plans
- Operational compliance, including appropriate inclusion in the school's academic program, assessments, and extracurricular activities.
- Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- Access to the school's facility and program to students in a lawful manner and consistent with students' IEPs or 504 plans

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 12d**

Is the school protecting the rights of English Language Learner students?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

**Does not meet standard:**

The school failed to comply with one or more applicable laws, rules, regulations, and/or provisions of the charter contract (including Title III of the Elementary and Secondary Education Act, and US Department of Education authorities) relating to requirements of English Language Learners, including, but not limited to:

- Equitable access and opportunity to enroll
- Development and implementation of required plans related to the service of ELL students
- Proper steps for identification of students in need of ELL services
- Appropriate and equitable delivery of services to identified students
- Appropriate accommodations on assessments
- Exiting of students from ELL services
- Ongoing monitoring of exited students

District comments/recommendations: The school materially complies with this standard.

School comments:



### 13. Governance and Reporting

<b>Measure 13a</b> Is the school meeting financial reporting and compliance requirements?
<p><b>Meets standard:</b></p> <p><input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial reporting requirements, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit</li> <li>● All other reporting requirements related to the use of public funds</li> </ul>
<p><b>Does not meet standard:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial reporting requirements, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● Complete and timely submission of financial reports, including: annual budget, revised budgets (when applicable), quarterly financial reports, and annual municipal audit</li> <li>● All other reporting requirements related to the use of public funds</li> </ul>
District comments/recommendations: The school materially complies with this standard.
School comments:

<b>Measure 13b</b> Is the school following Generally Accepted Accounting Principles (GAAP)?
<p><b>Meets standard:</b></p> <p><input checked="" type="checkbox"/> The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● An unqualified audit opinion</li> <li>● An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses</li> <li>● An audit that does not include a going concern disclosure in the notes or an explanatory paragraph within the audit report</li> </ul>
<p><b>Does not meet standard:</b></p> <p><input type="checkbox"/> The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to financial management and oversight expectations by an annual independent audit, including, but not limited to:</p> <ul style="list-style-type: none"> <li>● An qualified audit opinion</li> <li>● An audit containing significant findings or conditions, material weaknesses, or significant internal control weaknesses</li> <li>● An audit that included a going concern disclosure in the notes or an explanatory paragraph within the audit report</li> </ul>
District comments/recommendations: The school materially complies with this standard and submitted an audit with no material or significant findings.
School comments:

**Measure 13c**

Is the school complying with applicable governance requirements?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to governance by its board, including but not limited to:
- Board policies
  - Board bylaws
  - State open meetings law
  - Code of ethics
  - Conflicts of interest
  - Board composition and/or membership rules

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to governance by its board, including, but not limited to:
- Board policies
  - Board bylaws
  - State open meetings law
  - Code of ethics
  - Conflicts of interest
  - Board composition and/or membership rules

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 13d**

Is the school holding its administration accountable?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including but not limited to:
- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
  - The board conducting an annual evaluation of the administrator's performance

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, provisions of the charter contract, and its own internal policies and practices relating to oversight of school administration, including but not limited to:
- Board oversight of school administration that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement
  - The board conducting an annual evaluation of the administrator's performance

District comments/recommendations: The school materially complies with this standard.

School comments:

**Measure 13e**

Is the school complying with reporting requirements?

**Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including but not limited to:
- Accountability reporting
  - Attendance and enrollment reporting
  - Compliance with the charter contract and all applicable laws
  - Timely submission of all deliverables
  - Additional information as requested by the district

**Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to relevant reporting requirements to the district, and the Oregon Department of Education, including, but not limited to:
- Accountability reporting
  - Attendance and enrollment reporting
  - Compliance with the charter contract and all applicable laws
  - Timely submission of all deliverables
  - Additional information as requested by the district

District comments/recommendations: The school materially complies with this standard. Opal School consistently submits required deliverables on time and as requested.

School comments:

## 14. Students and Employees

### Measure 14a

Is the school protecting the rights of all students?

#### **Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the rights of students, including but not limited to:
- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
  - The collection and protection of student information
  - Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
  - Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

#### **Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and/or provisions of the charter contract relating to the rights of students, including, but not limited to:
- Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment)
  - The collection and protection of student information
  - Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction
  - Conduct of discipline (discipline hearings, and suspensions and expulsion policies and practices)

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 14b**

Is the school meeting teacher and other staff credentialing requirements?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including any teacher credentialing requirements provided in the Every Student Succeeds Act (ESSA), charter school licensure and registry requirements, and background check and fingerprinting requirements for all staff and volunteers.

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to state certification requirements, including any teacher credentialing requirements provided in the Every Student Succeeds Act (ESSA), charter school licensure and registry requirements, and/or background check and fingerprinting requirements for all staff and volunteers.

District comments/recommendations: The school materially complies with this standard as evidenced through required staff reporting deliverables to the district.

School comments:

**Measure 14c**

Is the school complying with laws regarding employee rights?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to employment considerations, including those relating to the Family Medical Leave Act, the Americans with Disabilities Act, and employment contracts (if applicable).

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to employment considerations, including those relating to the Family Medical Leave Act, the Americans with Disabilities Act, and employment contracts (if applicable).

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

## 15. School Environment

### Measure 15a

Is the school complying with facilities and transportation requirements?

#### **Meets standard:**

- The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:
- Americans with Disabilities Act
  - Fire inspections and related records
  - Viable certificate of occupancy or other required building use authorization
  - Documentation of requisite insurance coverage
  - Student transportation

#### **Does not meet standard:**

- The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including, but not limited to:
- Americans with Disabilities Act
  - Fire inspections and related records
  - Viable certificate of occupancy or other required building use authorization
  - Documentation of requisite insurance coverage
  - Student transportation

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 15b**

Is the school complying with health and safety requirements?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements
- Healthy and Safe Schools Plan (ORS 581-022-2233)

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services,, including, but not limited to:

- Appropriate nursing services and dispensing of pharmaceuticals
- Food service requirements
- Healthy and Safe Schools Plan (ORS 581-022-2233)

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

**Measure 15c**

Is the school handling information appropriately?

**Meets standard:**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

**Does not meet standard:**

The school was materially out of compliance with applicable laws, rules, regulations, and provisions of the charter contract relating to the handling of information, including, but not limited to:

- Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act (FERPA) and other applicable authorities
- Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities
- Transferring of student records
- Proper and secure maintenance of testing materials

District comments/recommendations: The district has no reason to believe the school has not met this standard.

School comments:

## 16. Additional Obligations

### Measure 16

Is the school complying with all other obligations?

#### Meets standard:

The school materially complies with all other applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, including, but not limited to requirements from the following sources:

- Revisions to state charter law
- Intervention requirements by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

#### Does not meet standard:

The school was materially out of compliance with applicable legal, statutory, regulatory, or contractual requirements contained in the charter contract that are not otherwise explicitly stated herein, included, but not limited to requirement from the following sources:

- Revisions to state charter law
- Intervention requirements by the district
- Action items assigned by the district
- Requirements by other entities to which the charter school is accountable (e.g. ODE)

District comments/recommendations: The school is responsive and timely with all requests and requirements from the district.

School comments:

## 17. School goals and recommendations (organizational)

### Measure 18a

Did the school meet the organizational goals it set forth in its 2019-20 Performance Plan?

Goal set in Plan	Goal achieved? (School response)	Why or why not? (School response)
Streamlined and efficient organization structure and roles as defined by Portland Children's Museum and Opal School	No	COVID



**Measure 18b**

In school year 2019-20, did the school implement the organizational recommendations from the district in the 2018-17 annual performance report?

<b>Recommendation from the district</b>	<b>Recommendation implemented? (School response)</b>	<b>Why or why not? (School response)</b>
<p>No district organizational recommendations were made in 2018-19 report; all organizational measures were met. Organizational performance indicators are derived from sources such as site visits, reports from the school, feedback from the school community, Synergy, TSPC, school handbooks and policies, and others.</p>		

**Measure 18c**

Based on the 2019-20 school year data presented in this report, will the school add any organizational goals to its 2020-21 Performance Plan? (Copy and paste as needed for additional goals.)

<b>Goal added to Plan:</b>				
Practical Strategies	Rationale	Professional Development	Assess Progress	Use of Resources

## Opal Charter School 3-year Trend Performance Summary

### Performance Framework Summary Rubric

**E=Exceeds standard M=Meets standard D=Does not meet standard F=Falls far below standard**

		2018 -19	2017 -18	2016 -17
	<b>ACADEMIC</b>			
1a	School meets Oregon School Rating System standards			
1b	School meets Oregon indicators of academic accountability	M		
1c	Student achievement in READING as compared to district	M	E	E
1d	Student achievement in MATH as compared to district	M	M	M
1e	Special populations achievement in READING as compared to district	M	E	E
1f	Special populations achievement in MATH as compared to district	D	M	M
2a	Annual academic growth in READING as compared to State Target	E	E	M
2b	Annual academic growth in MATH as compared to State Target	M	E	M
3a	Special populations growth in READING as compared to State Target	*	*	*
3b	Special populations growth in MATH as compared to State Target	*	*	*
5	Students with chronic or severe absenteeism as compared to district; as of 2017-18, "Regular Attenders" as compared to State Level 3 indicator	M	M	D
6	NA, for Grades 6-12 only			
7	NA, for High Schools only			
	<p>*Not reported, did not meet minimum n-size to receive rating</p> <p>2019-20 COMMENTS: Annual summative achievement measures were not available/not applicable due to impact of COVID-19 in 2019-20. Requirements of Distance Learning for All as defined by Oregon Department of Education Guidance were met.</p> <p>2018-19 ACADEMIC COMMENTS: 1f - The only group included in Special Populations rating is Students with Disabilities, based on a combined 3-year average due to small sample size. While the school did not meet District average, it did meet the State MIP target for Students with Disabilities. The school met or exceeded all other applicable academic achievement measures in 2018-19.</p>			
	<b>FINANCIALS</b>			
		2019 -20	2018 -19	2017 -18
9a	Current ratio	M	M	M
9b	Unrestricted days cash	M	M	M
9c	Enrollment variance	M	M	M
9d	Default	M	M	M
10a	Total margin	D	D	D
10b	Debt to asset ratio	M	M	M
10c	Cash flow	D	M	D

10d	Debt service coverage ratio	D	D	D
	<p>FINANCIAL COMMENTS:  10a, 10c, 10d - Total Margin, One-year Cash Flow, and Debt Service Coverage do not meet the standard set by NACSA, which could be an indicator of risk for long term sustainability. However the school consistently maintains a healthy cash balance (210 days unrestricted cash) and does not carry debt. In addition, Opal's facility is effectively donated so there are no lease payments. Opal's Board should continue to monitor the school's cash flow and budget closely.</p> <p>All other financial measures have met the standard.</p>			
	<b>ORGANIZATIONAL</b>	<b>2019 -20</b>	<b>2018 -19</b>	<b>2017 -18</b>
12a	School is implementing education program as defined in contract	M	M	M
12b	School is complying with applicable educational requirements	M	M	M
12c	School is protecting the rights of students with disabilities	M	M	M
12d	School is protecting the rights of English Language Learner students	M	M	M
13a	School is meeting financial reporting and compliance requirements	M	M	M
13b	School following Generally Accepted Accounting Principles (GAAP)	M	M	M
13c	School complies with applicable governance requirements	M	M	M
13d	School holds its administration accountable	M	M	M
13e	School complies with accountability reporting requirements	M	M	M
14a	School protects the rights of all students	M	M	M
14b	School is meeting teacher and other staff credentialing requirements	M	M	M
14c	School complies with laws regarding employee rights	M	M	M
15a	School complies with facilities and transportation requirements	M	M	M
15b	School complies with health and safety requirements	M	M	M
15c	School handles information appropriately	M	M	M
16	School complies with all other obligations	M	M	M
	<p>ORGANIZATIONAL COMMENTS:  All organizational measures have met the standard in 2019-20. Opal has remained consistent and reliable in timely reporting, compliance with applicable requirements, and planning for operational sustainability within the limits of being a component program of Portland Children's Museum.</p>			