



Charter School Operator Annual Progress and Financial Report Guidance

2024 Report Guidance

Tennessee Department of Education | Updated September 2024

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Part I

Introduction

[T.C.A. § 49-13-120\(a\)](#) requires the governing body of each public charter school to submit an annual progress report to both the charter school authorizer (“authorizer”) and the Tennessee Department of Education (“department”). This report must include, at a minimum:

- The progress of the school towards achieving the goals outlined in its charter agreement;
- Financial records of the school, including revenues and expenditures; and
- A detailed accounting, including amounts and sources, of all funds received by the public charter school, other than those funds received under [T.C.A. § 49-13-112\(a\)](#).

If the annual report provided by the school does not meet those statutory requirements, the authorizer may require the governing body of the charter school to amend and resubmit the report.

The process of completing the annual report provides a meaningful opportunity for the school’s governing body to synthesize relevant data and reflect on the performance of the school in the preceding school year. The school’s governing board should use annual reports to measure progress toward the goals outlined in its charter agreement, adjust operations based on this information, and gauge the likelihood of renewal of its charter. Charter authorizers should use annual reports to provide effective oversight of charter schools, share best practices across schools, and to guide renewal, nonrenewal, or revocation decisions. In addition, charter authorizers use the annual reports to complete their annual authorizing reports, which must be submitted to the department and the State Board of Education (SBE) by January 1 of each year.¹

¹ If the deadline falls on a Saturday, Sunday, or state observed holiday, the required report shall be due on the next business day.

Part II

Submission Instructions

Deadline

Annual reports shall be provided to the authorizer and to the department **no later than 5 p.m. central time on October 1 annually**². Charter schools shall complete the charts and questions listed below in the content requirements section to satisfy the reporting requirements.

Preparation Guidelines

- An annual report is required for each school that has an active charter agreement.
- All content shall be easily identifiable.
- The annual report shall not exceed 20 pages (excluding attachments).
- The annual report shall be submitted as a PDF document.
- The annual report document shall be saved as: “[School Year] Annual Report for [School Name]”
Bracketed text shall be replaced as follows:
 - [School Year] replaced with the school year covered within the report
 - [School Name] replaced with the name of the operating charter school
 - **Example:** 2023-24 Annual Report for Example Middle School
- Any additional attachments shall be saved under the corresponding section number and a brief identifying label.

How to Submit

- The annual report shall be submitted electronically to the department via the [Charter School Document Upload Form](#) (Formstack).
- In addition to submitting to the department, charter school operators are responsible for submitting their annual report to authorizers. Operators should communicate with their authorizer to verify any specific submission requirements.

² If the deadline falls on a Saturday, Sunday, or state observed holiday, the required report shall be due on the next business day.

Part III

Content Requirements

The annual report must include all content listed in Sections I through V.

Section I: Cover Sheet

Schools shall provide a cover page that includes the following information:

- I. School year that annual report contains
- II. Date of Report
- III. School Information
 - a. School name
 - b. School network and/or CMO
 - c. School phone number
 - d. School fax number
 - e. School address
 - f. School email address
 - g. School website
- IV. Report Preparer Information
 - a. Name
 - b. Title
 - c. Phone Number
 - d. Email Address
- V. A [cover sheet template](#) is provided below that schools may opt to utilize.

Cover Sheet Template

Charter School Operator Annual Report

[YEAR OF REPORT]

[Insert School Logo]

School Name	
Network and/or CMO Name	
School Phone Number	
School Fax Number	
School Email Address	
School Website	

Report Prepared By	
Name	
Title	
Phone Number	
Email Address	
Date of Report	

Section II: Introduction to the School

Outline the basic introductory information about your school by providing the information included in the table below.

Name of School	
School ID Number	
Network and/or CMO Name	
Authorizer	<i>If applicable: previous authorizer and year of transition</i>

Milestone Dates	
Year School Opened	
Year of Next Renewal	
Beginning Date of Current Charter Agreement	
Year Charter Agreement Expires	

Grade Levels Served													
	K	1	2	3	4	5	6	7	8	9	10	11	12
Grade Span Approved in Charter Agreement													
Current Grade Spans Served													

Student Enrollment	
Max. Enrollment per Charter Agreement	
Current Enrollment	
Current Number of Students on Waitlist	

Daily School Hours	
Number of Instructional Days per School Year	
Mission Statement	

School Contact Information	
Executive Director Contact	
Executive Director Name	
Executive Director Email Address	
Executive Director Phone Number	
Head of School Contact	
Principal / Head of School Name	
Principal / Head of School Email Address	
Principal / Head of School Phone Number	
Primary Finance Contact	
Finance Contact Name	
Finance Contact Email Address	
Finance Contact Phone Number	
Primary Data Contact	
Data Contact Name	
Data Contact Email Address	
Data Contact Phone Number	
Primary Testing & Assessment (T&A) Contact	
T&A Contact Name	
T&A Contact Email Address	
T&A Contact Phone Number	

School Progress Report Indicators

Authorizers determine school progress by reviewing academic, operational, and financial indicators. Respond to the prompts within Sections III through V to illustrate the school's prior year progress.

Section III: School Progress Report: Academic Performance

- I. Describe the progress made during the prior school year toward the academic goals outlined in your charter agreement. First, identify each goal or indicator. Then, for each goal or indicator, please answer the following:
 - a. What progress toward this goal was made over the course of the prior school year? Provide the applicable quantitative data, if available, and/or a narrative to support this analysis. If progress cannot be determined, identify the unavailable metrics that would typically support a determination.
 - b. If the goal or metric was met, what key levers, policies, and/or practices led to success?
 - c. If the goal or metric was not met, what hindered the organization's ability to attain the desired outcome?
 - d. How is the school's board planning to address any areas of weakness moving forward?
- II. Describe any academic deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - a. What steps is the school's board taking to remedy these deficiencies?
- III. Please describe the 3-5 highest priority action steps the school's board plans to take to address any concerns about academic performance and/or to drive continuous improvement.

Section IV: School Progress Report: Operations Performance

- I. Describe the progress made during the prior school year toward any operational goals outlined in your charter agreement.
- II. Complete the table in [Subsection I](#) for identifying members of the governing board for the prior school year. In addition, please answer the following question:
 - a. What turnover, if any, has occurred on the school's governing board?
- III. Complete the table in [Subsection II](#) for identifying members of school leadership for the prior school year. In addition, please answer the following questions:
 - a. What turnover in school leadership, if any, occurred during the prior school year?
 - b. What changes in school leadership structures, if any, occurred during the prior school year?
- IV. If part of a charter management organization (CMO) or network of schools, please complete the table in [Subsection III](#) for identifying members of network leadership for the prior school year. In addition, please answer the following questions:
 - a. What turnover in network leadership, if any, occurred during the prior school year?
 - b. What changes in network leadership structures, if any, occurred during the prior school year?
- V. Describe any operational deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - a. What steps is the school's board taking to remedy these deficiencies?
- VI. Complete the student attrition table in [Subsection IV](#), outlining reasons students withdrew over the course of the prior school year. Do not include student names or initials. Referencing the data included in the chart, please answer the following:
 - a. How does the school track the reasons for student attrition?
 - b. How does that data inform school planning?
 - c. What steps did the school take to gauge and reduce student attrition in the prior school year?
- VII. Briefly summarize the parent and community engagement efforts undertaken by the school during the prior school year.
 - a. How did the school engage parents over the course of the year?
 - b. What community partnerships were cultivated or maintained?

Subsection I: Governing Body Leadership

Complete the table below for each member of the governing board during the prior school year. Add additional rows as necessary.

Board Members for the [Enter School Year] School Year							
Name	Current Role	Area of Focus / Expertise	Board Position	Email Address	Total Term Length	Term Start Date	Term End Date
	Job and Employer	Ex: Legal, Real Estate, Finance, etc.	Ex: board chair, other officer, parent representative, ex officio member				

Subsection IV: Student Attrition Data

Complete the table below identifying the reasons that students withdrew from the school during the prior school year. The total number of students should match the number of students withdrawn in state and district reporting systems. **Do not include student names or initials.** Authorizers may request further information regarding individual student withdrawals.

Reason	Number of Students
Moved out of district or state	
Transportation	
Concerned with academic expectation	
Concerned with discipline practices	
Expelled	
Withdrawn due to breach of behavior agreement (but not expelled)	
Unknown	
Other (please specify):	
Total Number of Students Withdrawn	
Student Attrition Rate (%)	

Section V: School Progress Report: Financial Performance

- I. Describe the progress made during the prior school year toward any financial goals outlined in your charter agreement.
- II. Provide the funding source and amount for any funds received other than those received under T.C.A. § 49-13-112(a). Sources should include, but aren't limited to:
 - a. Direct federal grants,
 - b. Grants, gifts, or donations from any private sources (identified by source), and
 - c. State funds appropriated directly to support the public charter school.
- III. Describe any financial deficiencies identified in authorizer performance frameworks or other notices of concern over the past year.
 - a. What steps is the school's board taking to remedy these deficiencies?
- IV. Identify the total amount and percentage of the annual budget expended upon facilities, including renovations and improvements, maintenance and repairs, and lease or mortgage payments.
- V. Please **attach a copy** of the most recent annual audit for the school.
- VI. If the annual audit identified any internal control deficiencies or material weakness, please outline the corrective actions being taken to remedy the deficiencies.