

Wisconsin

Charter Schools Association



Wisconsin Charter Schools Association

Strategic Plan 2012 – 2014

Prepared for the Board of Directors
by Stezala Consulting, LLC

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Subsequent revisions:

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I. Executive Summary

The Wisconsin Charter Schools Association (WCSA) is a membership organization founded in 2000, and incorporated in 2007 that represents the charter school movement and the needs of individual charter schools in Wisconsin. For the last several years, WCSA has averaged more than 100 members among the more than 200 charter schools in the state. The WCSA has built its membership and its reputation as a credible, viable source of information for school leaders and teachers. The organization has strong relationships with state charter school administrators and charter advocates and is well-positioned to expand its scope, services, and visibility.

The newly adopted mission of WCSA is to improve student achievement in Wisconsin by supporting excellence in public charter schools through:

- *The creation and ongoing support of autonomous, accountable and innovative public charter schools; and*
- *Advocacy on behalf of public charter schools.*

The WCSA Board of Directors recently completed a strategic planning process that resulted in the recruitment of three new board members, a new board president, and these overarching goals for the organization and its allies:

- Improve the quality of charter schools, marked by strong governing boards, more and high-quality authorizing options, and higher student achievement levels.
- Increase the quantity of high-quality autonomous charter schools in Wisconsin, and subsequently, the number of students attending them.
- Improve the environment for charter schools to thrive.

The board has identified five strategies by which to accomplish these goals, as follows:

1. Quality – relentless pursuit of improving public charter school academic and operational quality, using performance management strategies that include rigorous data collection and analysis
2. Growth – increase the number of independent, autonomous, high performing schools across the state, especially in areas with existing low performance; identified as “communities of interest”
3. Advocacy – tell the story of charter schools to citizens, elected officials, the media and other stakeholders to affect positive change and more participation in the charter school movement
4. School Services – deliver high quality guidance, consulting, technical assistance, referrals and professional development to emerging and established public charter school staff and leaders
5. Sustainability – ensure WCSA’s longevity in the education marketplace by focusing on sound financial practices and resource, board, leadership and staff development

Each of these strategies is expected to be implemented, to some degree, over a three-year period, and supported by consistent, clear and compelling communication. The annual budget will range from \$350,000 to \$450,000 each year for the next three years if funding is acquired. WCSA’s board will recruit a new Executive Director to lead the organization and garner necessary resources for the cause. *Hiring a new executive director and implementing this plan can only occur as funding allows. Scenarios are detailed in the Executive Transition Plan in the appendix.*

NOTE: This plan was predicated on the merger of the Milwaukee Charter School Advocates with WCSA. On December 12, 2011, the organizations decided not to merge and to keep WCSA intact until March 15, 2012 to address the sustainability issues of the organization. The board of directors will re-consider the plan at that time.

II. Introduction

The Wisconsin Charter Schools Association (WCSA) is a membership organization founded in 2000, and incorporated in 2007 that represents the charter school movement and the needs of individual charter schools in Wisconsin. The WCSA has built its membership and its reputation as a credible, viable source of information for school leaders and teachers. The organization has strong relationships with state charter school administrators and charter advocates and is well-positioned to expand its scope, services, and visibility.

The mission of WCSA is to improve student achievement in Wisconsin by supporting excellence in public charter schools through:

- *The creation and ongoing support of autonomous, accountable and innovative public charter schools; and*
- *Advocacy on behalf of public charter schools¹.*

In 2010-2011 WCSA enrolled 115 public charter school members of the 226 charter schools in the state; at the time of this publication, the organization was in the midst of membership renewals and had secured 58 members in the 2011-2012 school year.²

Through a generous grant from the Walton Family Foundation in August 2011, WCSA was able to engage in a strategic planning process to determine the direction of the organization in terms of governance, leadership and priorities. The following conditions shaped the planning process:

- Due to time constraints and budgetary issues, WCSA requested an expedited planning process which occurred from August to October 2011.
- In addition, the *Milwaukee Charter School Advocates (MCSA)* requested a simultaneous, although smaller scale, planning process that included a possible merger or integration of the two organizations.
- WCSA, in the Summer of 2011, accepted the resignation of its Executive Director, shifted to an Interim Director, and re-constituted its board.
- Sweeping charter school legislation, in the form of Senate Bill 22 (SB22), was being debated in the capitol and nearly passed in the Fall 2011 session—short of one vote; it is expected to be re-introduced in the Spring 2012 session.

This introduction is important so that community stakeholders, members and potential supporters can understand the landscape in which the strategic plan was created.

The goals of the strategic planning process were to critically evaluate, modify, and strengthen WCSA's strategic plan and equip WCSA with the mission, methodologies and resources needed to considerably increase the number and quality of high-performing, autonomous charter schools throughout Wisconsin.

WCSA contracted with Stezala Consulting, LLC to manage the strategic planning process. The boards of WCSA and MCSA agreed to allow the consulting company to

¹ New mission statement adopted by the board in the strategic planning process.

² WCSA is transitioning to a single fall enrollment schedule for new and renewal members in 2012; whereas in previous years schools would join during the fall or during the spring, at their discretion.

work with both organizations simultaneously, for cohesiveness and efficiency in the process.

Based on the time, budget and resources available, the steps of the strategic planning process were:

- Step 1: Environmental scan to uncover major driving forces, internally and externally, that affect WCSA.
- Step 2: Mission agreement or refinement to ensure that the proposed goals and strategies will help fulfill the mission; and to ensure that governance and leadership support the mission.
- Step 3: Research and analysis to identify areas and opportunities for possible improvement, alignment and leveraging.
- Step 4: Establish or refine goals, and the strategies, resources and methods by which to accomplish the goals.
- Step 5: Determine and document measures of progress/outcomes.
- Step 6: Document and assemble strategic plan.
- Step 7: Create executive summary version for dissemination.
- Step 8: Disseminate and celebrate the plan.
- Step 9: Coaching and support for early steps in implementation.

The planning consultant conducted three board strategy sessions for WCSA, plus two in conjunction with MCSA, and several individual and group board member meetings. The consultant also conducted personal interviews or group feedback sessions with more than 25 WCSA and MCSA community stakeholders, members and charter school advocates, including three representatives from charter associations. And, the consultant provided weekly coaching calls or meetings with the Interim Executive Director to assist during the transitional phase of the organization. The consulting team gathered additional information and data from sources such as:

- National Alliance for Public Charter Schools
- Wisconsin Department of Public Instruction
- Walton Family Foundation Grantee Profiles
- Media reporting on charter schools or charter school issues
- WCSA staff and program records

WCSA wishes to formally thank all individuals who participated in interviews or provided background research. This information was crucial in the board's discernment process.

The board and WCSA also conducted due diligence within their own circles of influence to inform the process, specifically in terms of board development and sustainability. As a result, WCSA concluded the strategic planning process with the addition of three new board members.

While MCSA and WCSA were in alignment through much of the planning process, in December 2011, the board of the MCSA decided not to merge with WCSA.

Hiring a new executive director and implementing this strategic plan can only occur as funding allows. Scenarios are detailed in the Executive Transition Plan in the appendix.

III. Needs/Context

With a focus on the growth of high-quality independent charter schools in the state, to benefit more students, WCSA considered the needs of the sector *and* the needs of the organization in equal measure.

During this transitional phase, it was essential to capture statewide data but also look internally at what type of organization WCSA needs to become to affect large scale positive change. In addition to the interviews, group feedback sessions and data sources, WCSA also used information from a SWOT Analysis and board inventory to shape its plan.

While it is not the purpose of this document to write a historical perspective on charter schools, it is important to understand the context in the state. Highlights of evidence garnered throughout the process are included below.

Schools and Students

In 2010, the State of Wisconsin enrolled more than 871,000 students who attended approximately 2200 public schools³ in the state, including charter schools. In 2011, 235 public charter schools operated representing 11% of 2215 public schools. Enrollment figures were available from the 2010 school year. Information is summarized below.

Category	Independent	Non Instrumentality	Instrumentality	! " # \$ % & ' () * +	Traditional Public School	TOTAL
Number of Schools (2011)	20 = 9%	26 = 11%	189 = 80%	235 = 100%	1980	N=2215
Number of Students (2010)	6931 = 19%	5215 = 14%	25,210 = 67%	37,356 = 100%	834,197	N=871,553
Percentage of All Public Students	0.8% of all students	0.6% of all students	2.9% of all students	4.3% of all students	95.7% of all students	

Wisconsin is unique in how charter schools can be authorized, with three categories of charter authorization: instrumentality, non-instrumentality and independent. Across Wisconsin, a school board can authorize a charter school in their school district and determine whether the school will be an instrumentality of the district, or a non-instrumentality school. Non-instrumentality schools are characterized by more freedom from the district but most significantly, are not required to hire union teachers.

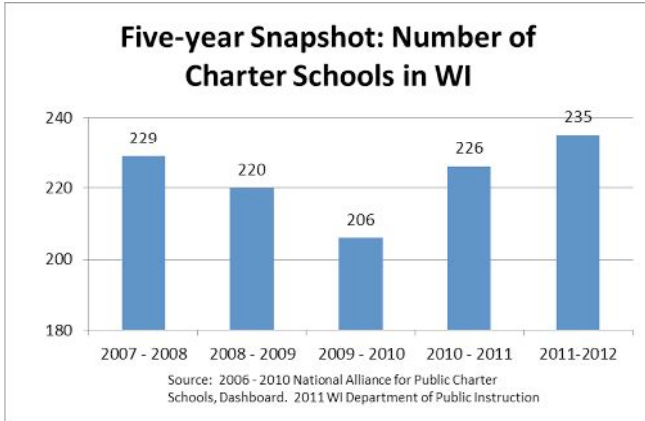
In Milwaukee, multiple charter school authorizers are allowed beyond the Milwaukee Public School District. The schools authorized outside of the school district are called "independent" or "2R" schools, after the legislative statute through which the schools can be created. These authorizers include:

- University of Wisconsin-Milwaukee
- City of Milwaukee
- Milwaukee Area Technical College (MATC) (currently no charter schools are authorized)

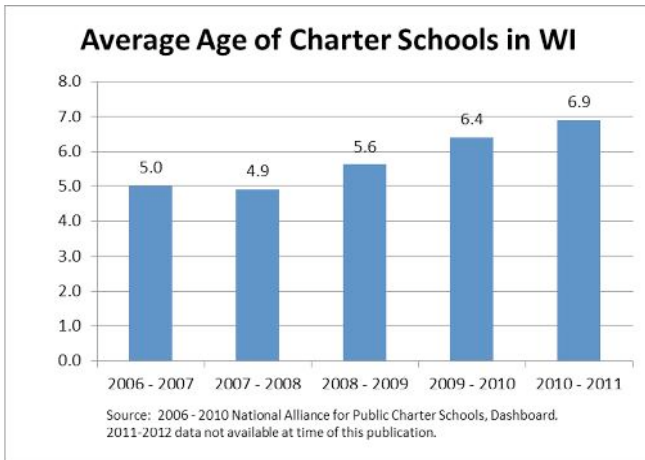
³ Figures supplied by WCSA staff, based on reports from DPI; discrepancies exist among local and national reports based on when numbers were pulled, which schools were included, etc.

Lastly, schools in Racine may be chartered by the University of Wisconsin-Parkside but enrollment may not exceed 480 students, as determined by state law. One school is currently authorized by UW-Parkside.

Wisconsin has remained somewhat stable in the *net* numbers of charter schools in operation, with the number averaging above 200 since the 2007/08 school year. This accounts for the annual flux of schools opening and closing.



Over the years, the average age of charter schools, measured by years in operation, has increased slightly to reflect the longevity of the schools. In 2006-2007 the average age of a charter school in Wisconsin was 5 years but in the 2010-2011 school year it reached 6.9 years. This is noteworthy because more schools are moving beyond the 5-year mark in terms of their organizational development and have made it past the “start-up” stage.



Charter schools were envisioned to have an impact in areas of need. In Wisconsin public schools, lower achievement exists in some rural schools, but is more prevalent in city schools that enroll large numbers of poverty-level students and students of color. The following charts show where charter schools have been operating, and student enrollment, by geography:

Charter Schools			Non-Charter Schools		
Metrics	# of Schools	%	Metrics	# of Schools	%
City	98	47.60%	City	447	22.00%
Suburbs	25	12.10%	Suburbs	373	18.40%
Town	41	19.90%	Town	388	19.10%
Rural	42	20.40%	Rural	824	40.60%
TOTAL	206	100%	TOTAL	2032	100%

Source: National Alliance for Public Charter Schools, 2009-2010 School Year

Charter Schools			Non-Charter Schools		
Metrics	# of Students	%	Metrics	# of Students	%
City	24,607	67.80%	City	215,138	25.70%
Suburbs	3,703	10.20%	Suburbs	204,307	24.40%
Town	4,469	12.30%	Town	176,554	21.10%
Rural	3,489	9.60%	Rural	240,054	28.70%
TOTAL	36,268	100%	TOTAL	836,053	100%

Source: National Alliance for Public Charter Schools, 2009-2010 School Year

By far, more charter school students are enrolled in charter schools located in *cities* (67.8%) than other locales. Of the 24,607 city students, the vast majority are in Milwaukee.

While the number of schools and students is clear, definitive comprehensive information on school achievement in charter schools has been elusive over the years due to competing methodologies among researchers and inconsistency and availability of quality data. Also, some charter school leaders argue that standardized tests do not fully capture the growth in their students or reflect their innovative approaches to curriculum, design and learning.

At minimum, it is well-established that low-income minority students do not fare as well as their more affluent non-minority peers, and therefore many charter schools target these low-income minority populations in an attempt to close the achievement gap.

General statistics about student achievement for these vulnerable groups includes:

- Only 9% of Wisconsin's African-American fourth graders scored proficient in Reading in the most recent annual NAEP study, putting Wisconsin at the bottom of list in Reading achievement for this group, compared to other states.
- Less than 70% of Milwaukee Public School youth graduate from high school; of those who do, less than half go to college.
- Nearly 40% of Milwaukee youth live in poverty (U.S. Census); and, nationally, the lowest income quartile has only an 8% chance of graduating from college (Post-Secondary Education Opportunity).

A few flagship schools, mostly autonomous charter schools in Milwaukee, have been able to show academic growth over time that surpasses the norm for these high-need populations. If more students are to achieve higher levels, then WCSA seeks to support

schools on their pathway to autonomy, while fostering and monitoring school accountability.

Lastly, Wisconsin's charter school law was ranked 34 out of 41 states in a report compiled by the National Alliance for Public Charter Schools, and it earned a grade of "C" in another independent study. Several weaknesses were identified with inequity in school funding, lack of accountability measures and performance monitoring, and inadequate authorizer accessibility, funding and oversight, to name a few.

WCSA – Organization

During the strategic planning process WCSA operated with a full-time Interim Director and a part-time Deputy Director, and a board of four people. A major effort was made to stabilize the organization and increase the functionality of the board by adding new members with needed expertise.

SWOT

WCSA conducted a SWOT analysis and board inventory to capture the Strengths, Weaknesses, Opportunities, and Threats facing the organization. The results of the SWOT analysis revealed a time of uncertainty in the charter school movement, but also a time for renewal and commitment to the cause. The findings are briefly summarized below.

Strengths: stability and competency of current staff; ability to maintain activities under pressure; ability to advocate on behalf of the movement.

Weaknesses: public perception and understanding of charter schools; future sustainability in light of difficult funding environment; consistent communication.

Opportunities: people and relationships; potential for new alliances and partnerships; possibility of increased autonomy due to new legislation affecting school structure, staffing and rules; possibility of new legislation that would be favorable to charter growth and autonomy.

Threats: volatility within and around charter school legislation; chasm between the characteristics and needs of more autonomous and less autonomous schools.

Board

In addition to the SWOT analysis, the board acknowledged its own limited bandwidth to accomplish goals and participated in a board profiling exercise to identify areas of need on the board. Upon receiving the results, the board recruited new members of diverse backgrounds with the following traits:

- An individual with excellent financial management and oversight skills.
- An individual with extensive knowledge of charter schools, who had served on the MCSA board.
- An individual with business and community knowledge from the Madison area.

The board also acknowledged the need, beyond board development, for more sustainability measures. They reviewed budgets, historical information about WCSA activities, and possible strategies for the operational structure of WCSA with the integration of MCSA.

Accomplishments

Briefly, it is important to acknowledge the accomplishments of WCSA, in the past year. Despite being under-staffed and facing challenges the organization was able to:

- Garner member support for legislative hearings and educational briefs about pending legislation.
- Earn more positive feedback as documented on conference evaluations.
- Build on the awards gala as the signature recognition event for WCSA, earning revenue beyond expenses.
- Invest in more face-to-face meetings with emerging and established schools.
- Disseminate more information on school autonomy and quality, and add 3000 names to the WCSA database through a grant from NAPCS.
- Secure support from Walton Family Foundation to conduct a strategic planning process.
- Continue building upon the data warehouse of public charter schools.
- Learn how to manage complex contracts across consultants, districts and the association.
- Establish more media contacts and gain coverage in a variety of local and statewide news sources.
- Support the growth of pedagogical networks across the state.

WCSA – Stakeholders

As part of the planning process, the consultant interviewed or gathered feedback in small group sessions from more than 25 people. The individuals who participated were selected by WCSA to reflect the members, non-members, and stakeholders of relevance at the time. In addition, WCSA staff and board, on their own, met with and discussed the future of WCSA with potential funders, legislators, charter school practitioners, etc.

The consultant conducted the interviews and group sessions *without* the presence of the WCSA Interim Director, to provide some degree of confidentiality in the discussions.⁴ Detailed summaries were provided to the board with the following key points about what the majority of the interview subjects would like WCSA to be, do or achieve:

Lead the charge for Wisconsin to become a more favorable environment for charter schools to thrive; they see the need for a membership organization as a driving force to make that happen and as a place for related resources. They emphasized cooperation, rather than competition with other resource organizations.

Create an organization that is *the place to network, gain knowledge and learn best practices* for charter schools, with WCSA being an intellectual leader, ahead of schools; they don't have time to monitor all possible developments or opportunities that affect charter schools.

Determine how to *best* meet the needs of sub-groups that sometimes have conflicting interests; determine what can be accomplished within its organizational capacity and how to structure membership differently.

⁴ The participants were assured of some degree of confidentiality for their responses, but not *anonymity* because WCSA knew who was participating.

Build the infrastructure to accommodate a membership organization that can provide direct services across emerging and established schools; focus on foundational aspects of managing a school, not pedagogical.

Advocate and communicate on issues specific to charter school authorizing and operations, but engage in broader efforts to inform the public, too.

Become a much stronger organization to push the achievement envelope in the state and negate or reduce the impact of organizations that do not support innovative independent charter schools.

Increase value as a political force with hundreds of supporters that legislators cannot ignore; to have the power, volume and recognition to be heard over other groups that are currently controlling the messages (and votes) about public schools.

IV. Goals

Based on all of this feedback and evidence gathered throughout the process, the board recognized the following overarching goals that will be described in detail in the subsequent pages and strategies:

- 1. Improve the quality of charter schools, marked by strong governing boards, better authorizers and higher student achievement levels.**
- 2. Increase the quantity of high-quality autonomous charter schools in Wisconsin, and subsequently, the number of students attending them.**
- 3. Improve the environment for charter schools to thrive.**

These goals recognize three levels of influence for change:

- Movement Level (media, statewide policies and legislation, collective membership and allies)
- Organizational Level (schools, authorizers, WCSA)
- Individual Level (students, teachers, parents, principals, authorizer officials, elected officials)

Therefore, strategies must target, specifically, one or more levels to affect change.

V. Strategies/Objectives

WCSA has determined five strategies by which to meet its goals and further its mission. Each is described below with outcomes tied to success in the next three years. The degree of implementation is indicated in the chart below. *Numbers 1 to 3 (1 being the low end of the scale and 3 being the high end) represent the degree to which staff will focus efforts on each strategy in a given year, based on projected organizational capacity.* Communication is a strategy that is infused into every other strategy.

Strategy Implementation Timeline 2012 - 2014

Category	2012	2013	2014
Quality	1	2	3
Growth	1	2	3
Advocacy	3	3	3
School Services	1	2	3
Organizational Sustainability	3	3	3
Communication			

Quality

As indicated earlier, achievement across charter schools lacks definitive research, but individual examples of high-achieving charter schools exist. These high performing charter schools are characterized by the ability to close the achievement gap among populations in need, strong governance, autonomy to meet the needs of their students in flexible ways, and innovation to push results.

WCSA has already published and adopted the NAPCS framework for school quality and encourages members to take the related self-assessment. To bolster the call for, and practice of accountability, WCSA will establish new benchmarks for membership, based on the level of autonomy and performance of schools. New staff and a sub-committee of members will create the matrix, based on the NAPCS framework. The result will be tiered membership, whereby WCSA can devote its limited time and resources to propelling the great schools forward and assisting high potential schools with reaching the next level of quality through strategic alliances, support and services.

WCSA envisions Year One as being the formative year by which to create and implement the system, inform the membership and begin transferring members to the new framework. Direct support would occur at regional meetings, through the conference and with limited one-on-one services. WCSA staff would also continue to build on the data warehouse started in previous years.

While WCSA does not have the capacity to build a performance management infrastructure in Year One, it is expected to increase that capacity in Years Two and Three through the "Quality" strategy.

Year Two and beyond will have an emphasis on growing the capacity for, and providing direct support to schools that seek to use Performance Management Systems more rigorously.

QUALITY SUMMARY: Establish Standards, Engage Schools to Participate, Provide Support to Achieve

Objectives:

Year One	Year Two	Year Three
Establish new standards for membership categories, and the review and improvement process	Modify standards as needed based on Y1 experience	Standards become institutionalized within WCSA and participating schools
Create plan to complete the data warehouse	Complete data warehouse; fully functional and maintained	WCSA plays leadership role in sharing member data; building allies and gaining resources to maintain
100% of member schools are assigned to and comply with membership categories/standards	ID and support schools as WCSA capacity allows; provide regional support "institutes"	75% of member schools participate in review and improvement process to maintain or move up

Growth

WCSA and its membership schools face several challenges, and potential opportunities, to increase the number of students who attend high quality charter schools. Since the 2007-2008 school year to the present, net yearly growth of *students* in charter schools has been less than 2%, according to the NAPCS Dashboard for Wisconsin.

A primary objective is to always seek and support bold legislation that can make Wisconsin a better environment for charter schools to thrive.

The hallmark legislation that could allow for a statewide authorizer and other favorable terms, SB22, is stalled in legislation as of this publication. The table below summarizes growth strategies tied to the success or failure of passing SB22:

Legislative action:	Scenario:
SB22 Passes in Spring 2012	#1 WCSA would move into high gear to offer counsel in the establishment of a statewide authorizing authority, which would essentially give potential and existing schools greater choices in whom they choose as an authorizer. WCSA would engage in a campaign to inform school leaders across the state of this new opportunity.
SB22 Fails to Pass in Spring 2012, moved after Fall Elections (most likely scenario)	#2 WCSA would continue to inform the public charter school community and legislators about the benefits of such legislation. WCSA builds allies and community voices to be heard during new legislative session.
SB22 Passes in Fall 2012	See #1
SB22 Does not	#3

Pass in Fall 2012	WCSA and its allies would re-convene to consider other legislative options.
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WCSA also is cognizant that policies that are perceived favorable to some of its membership are perceived differently, even as harmful, by some other members. WCSA will heed the advice gathered during the planning process and focus efforts on policies that create the best chance for *innovation, autonomy and accountability*.

Regardless of the timing of SB22, WCSA has other options for growth.

The first option is to identify three to five communities of interest, whereby local leaders are friendly toward, or curious about the concept of charter schools, and the population density is such that new charters could affect hundreds, if not thousands of students. The impetus behind doing this is that, right or wrong, by the 2012/13 school year, districts will no longer be required to participate in collective bargaining, based on Act 10, which opens a door for flexibility and innovation in school structure and school districts. With a lack of direction, some schools may revert to old paradigms, allowing themselves to be inculcated by school districts. WCSA through its identification process will work with schools and districts to advocate for more flexible policies, using best practices from the charter school movement, and guide these parties through the process to greater autonomy.

The next strategy is to assist and support the expansion of existing high-performing schools and opening the door for high-quality Charter Management Organizations (CMOs). WCSA and MCSA have both assisted in passing Act 17 which gives the City of Milwaukee the ability to lease MPS facilities to 2R and non-instrumentality schools. New opportunities to support existing charter schools, or new CMO charter schools, may arise as they take advantage of the new spaces.

Lastly, WCSA will continue to monitor planning and implementation grants awarded by the WI Department of Public Instruction (DPI). DPI is in its third year of administering a federal grant to expand the number of charter schools in the state (25 schools are in the planning grant stage this year).

GROWTH SUMMARY: Seek and Support Growth-focused Legislation, Push for Autonomy Available through Act 10 and other means, Support High-Performers with Expansion, Increase Number of Students in Charter Schools

Year One	Year Two	Year Three
Focus heavily on passage of SB22	Focus on passage or implementation of SB22; TBD	n/a SB22 accomplished
ID and introduce communities of interest to charters and new flexibility offered in Act 10	Focus on communities of interest with advice, support, resources	Focus on communities of interest with advice, support, resources
Assist high-performing schools in efforts for expansion	Assist high-performing schools in efforts for expansion	Assist high-performing schools in efforts for expansion
Protect rights of schools in face of new policies, regulations, etc. of evolving charter school law	Protect rights of schools... Introduce plan for more equitable funding and seek funding to support cause	Monitor progress and devise solutions to threats; garner funds to support equitable funding efforts
Increase student enrollment in charters schools by 5%	Increase student enrollment in charters by	Increase student enrollment in charters by 5% w/out SB22 and

	5% w/out SB22 and 15% with SB22	15% with SB22
Secure \$30,000 to promote the expansion and growth of high quality charter schools	Secure \$48,000 to promote the expansion and growth of high quality charter schools	Secure \$75,000 to promote the expansion and growth of high quality charter schools

Advocacy

WCSA and MCSA have worked collectively to inform citizens, stakeholders and elected officials about the potential for monumental educational change through creating an environment favorable to the expansion, replication and growth of charter schools. This growth is only desired, however, if schools are able to reach higher levels of autonomy and accountability, while still maintaining the innovation that drives them. Ultimately, success in the charter school sector will inform practices in non-charter schools and entire districts, too, which is a desirable by-product of charter school initiatives.

During the strategic planning process, it was clear that members and stakeholders desire broader advocacy and education in their communities about the concept and value of charter schools. With charter school students currently comprising less than 5% of the state’s public school population, it is clear that more work needs to be done to inform the public about the need for, and value of, charter schools. WCSA has been able to garner local and statewide attention for charter schools, and, in fact some schools have been featured nationally (for instance, the Alliance School, the 2011 WCSA Charter School of the Year award winner, was featured in Time magazine). From June 2011 to October 2011 WCSA estimated that the association or its members were mentioned in the media in Wisconsin 45 times.⁵

Lastly, funding inequity exists with public charter schools receiving anywhere from 21 – 25% less than other public schools, in per pupil allocations.⁶

The board has worked to integrate the strategies suggested by MCSA into the strategic plan, leaving flexibility for the new Executive Director to finesse the plan, based on his or her own knowledge and strengths in advocacy. The top legislative changes affecting charter schools in the past year are:

- MPS facilities bill, now Act 17, which allows City of Milwaukee to lease MPS properties.
- Repeal of collective bargaining law, now Act 10, which allows public schools to negotiate work conditions and other operational issues free from collective bargaining. (MPS will be affected in 2013).
- Wisconsin’s adoption of common core standards and participation in Smarter Balanced Assessment Consortium which will align Wisconsin closer to other states in effectively measuring student achievement and growth over time.

There is still much work to be done and while some of the strategies were outlined in the “Growth” category, they bear repeating. All of these strategies will occur in cooperation and collaboration with efforts led by other charter school advocates such as the Metropolitan Milwaukee Associate for Commerce (MMAC), the National Alliance for Public Charter Schools (NAPCS) (which has provided outreach and communication grants to WCSA in the past and has a presence in WCSA with a staff member on the

⁵ This is based on keyword-specific Google alerts and original stories with pick-ups by other media.

⁶ Source: Report from Ball State University, Charter Schools Funding: Inequity Persists, C2010

transition team that led the strategic planning process) Schools That Can, PAVE, and other advocates for quality.

The main advocacy strategies are focused on:

1. City of Milwaukee Advocacy. Continue to support the growth of quality independent charter schools in the City of Milwaukee:
 - Connect city charter schools with access to facilities and financing.
 - Assist city charter schools in developing and monitoring rules, regulations and legislation that have an impact on the growth and quality of independent charter schools in the City.
 - Assist City charter schools in implementing the provisions of the evolving charter law.
 - Work with a coalition of organizations that serve the needs of existing charter schools in the City of Milwaukee and continue recruitment strategies to bring new quality charter school operators into the city.

2. State Advocacy. Continue to align WCSA strategies into a large coalition of like-minded organizations that would:
 - Oversee the design and development of a comprehensive charter school legislative strategy, pre- post- and during SB22 discernment and voting process.
 - Monitor the progress of existing rules, regulations and legislative initiatives.
 - Design and advance new rules, regulations and legislative initiatives and assist charter schools in implementing the provisions of evolving charter school law.
 - Develop and seek funding for a legal strategy that can be used to both protect the constitutional rights of charter schools and defend charter schools against challenges that are made against the implementation of charter school law.

3. Communities of Interest. Assist large urban areas with concentrations of low income students and poor performing schools to develop independent charter schools:
 - Select three to five urban communities outside of Milwaukee that contain large numbers of low-performing schools.
 - Identify individuals and groups to yield three communities that are willing to consider bolder strategies to foster autonomy in charter schools within the provisions of state law.
 - Provide interested parties with information, guidance and resources that would be needed to develop more independent public charter schools.
 - Assist the communities in establishing the governance structure that would be needed to take advantage of this opportunity.

In addition, advocacy efforts will be coordinated under the umbrella of communications to ensure consistency and impact of message for the Association.

ADVOCACY SUMMARY: Support Continued Growth in Milwaukee, Seek and Support Positive Legislation at State Level, Partner with Three Communities of Interest, Protect Rights, Focus on Equitable Funding

Year One	Year Two	Year Three
Focus heavily on passage of SB22	Focus on passage or implementation of SB22;	Revise or re-introduce legislation as necessary

	TBD	
ID and introduce communities of interest to charters and new flexibility offered in new laws	Focus on communities of interest with advice, support, resources	Focus on communities of interest with advice, support, resources
Protect rights of schools in face of new policies, regulations, etc. of evolving charter school law	Protect rights of schools... Introduce plan for more equitable funding and seek funding to support cause	Monitor progress and devise solutions to threats; garner funds to support equitable funding efforts
Wisconsin maintains or improves the environment for charter schools measured by increase in authorizing options	At least three districts or school communities participate in partnership for autonomy	Raise the required amount, TBD, for any legal needs.
Raise \$40,000 for education, outreach and advocacy	Raise \$30,000 for education, outreach and advocacy	Raise \$30,000 for education, outreach and advocacy

School Services

Based on a review of state association services compiled by NAPCS and a capacity summary compiled by the Walton Family Foundation, it appears that nearly every association provides "school services" to some degree. Those with larger budgets provide more services, often derived from fee-based services, whereas smaller associations are making referrals or serving as a hub to other service providers. In 2009 – 2010, WCSA attempted but struggled to provide consistent services using a model that combined independent consultants, fiscal agent fees and reimbursements from districts. WCSA halted this practice in early 2011 and has been encouraged by members to devise a new plan for providing essential services, especially to new or emerging schools.

As part of the strategic planning process, the board decided to start slow and rebuild the school services component with the primary vehicles in Year One being the conference, charter institutes, and minimal direct consulting, until the organization hires a new Executive Director. It will be a major initiative of the new Executive Director, based on the legislative and educational landscape at the time to design sustainable, comprehensive services and membership levels.

Communication will be a primary effort in Year One. Members will continue to receive newsletters, policy alerts, and discounts to WCSA events and programming, but WCSA will also create opportunities for school leaders to connect through technology in affinity groups or through regional Charter School Institutes/Meetups where they will gain industry knowledge and also meet their peers. For early 2012 WCSA will focus on member communication and the basics - "Charters 101" - for interested schools.

Categories of typical support identified by NAPCS, and plans for Year One include:

Category	Degree Planned in Year One (scale of 1 to 3)	Notes
Assessment and Accountability (Performance Management, Review, Standards)	2	WCSA will continue efforts on the data warehouse and monitor member schools' achievement and alignment with new categories
Human Capital	2	WCSA will continue

(Professional Development and Recruitment)		professional development through the conference, but not engage in recruitment at all
Governance (Recruitment and Training)	3	WCSA will continue and reinforce efforts through Charters 101 to offer governance training
School Operations: Support Services (Facilities, Finance, HR, IT)	1	WCSA will make referrals for these; it is not the core competency
School Operations: Procurement (group purchasing, insurance, vendor list)	2	WCSA will increase its preferred vendor program to connect schools and generate \$10,000 in revenue
School Funding/Fundraising (grant-writing funding intermediary)	1	WCSA will make referrals for these; it is not the core competency
School Start-up Support (Application, Development, Recruitment)	3	WCSA will provide counsel on start-up to schools that seek to become independent and autonomous and provide professional development through the conference and technology; WCSA will make referrals for assistance with student recruitment issues
Other Services (legal, special education advice, state conference)	3	WCSA will always direct schools to sound legal advice and special education advice and will host a conference expected to generate at least \$60,000 in revenue

Further detail is provided below based on specific activities that are being revived from the previous strategic plan with an emphasis on reasonable scale in relation to organizational capacity.

1. Focus on WCSA service quality and on leading themes (i.e., school quality; independence, autonomy; board development, governance training, etc.) by doing a few things well, aligned with the new membership categories.
2. Gather data on different types of students and schools, including comparisons of achievement at independent vs. non-independent charters to build a case.
3. Focus technical assistance on a targeted subset of charter schools—first based on independence and autonomy and second on school performance (especially with low-performing charters).
4. Work with new school development groups to ensure independence and autonomy (and quality), continuing to assist with charter contract preparation and negotiations (and helping them navigate the federal CSP process if there is a need).

5. Develop and promote model charter contracts between charter schools and authorizers, focusing on contractual terms that address independence, autonomy, and accountability. Conduct this in conjunction with the partnership “communities of interest” being addressed in the advocacy strategy.
6. Connect charters with like-minded legal counsel to increase independence and autonomy in their contracts.
7. Use technology to deliver content to broader groups of members or potential members (via dissemination grant technology apparatus).

Core services will always include the start-up or “101” phase but more advanced topics such as performance management, financial planning, charter renewal and other topics derived from the membership will be covered.

SCHOOL SERVICES SUMMARY: Communication, Charters 101, Contracts, and Advanced Topics

Year One	Year Two	Year Three
Focus on communications and building early “wins”	Hire part-time or contracted person	As funding allows, expand position or time
Determine content and roll out of Charter Institutes	Continue and grow Charter Institutes, and opportunities for networking	Streamline content provision through workshops, webinars, etc.
Deliver services according to membership benefit categories; schools must engage in specific services/thresholds for membership	Use technology to deliver content and training to members and potential members	Maintain infrastructure for member networks
Deliver small number of programs with limited focus	Expand menu of services	Maintain menu of services
Generate \$15,000 in revenue for services; generate at least \$60,000 from conference to net \$20,000	Generate \$35,000 in revenue for services; generate about \$70,000 from conference to net \$25,000	Generate \$70,000 in revenue for services; generate about \$80,000 from conference to net about \$30,000

Sustainability

One of the biggest issues for state charter school associations has been sustainability. Very few charitable resources exist to provide ongoing support for charter school associations and the most viable organizations seem to have one or two core funders with the rest of their revenue derived from a mix of membership dues, conference fees, service fees, and referral fees.

WCSA has addressed sustainability at four levels:

Governance

WCSA has made a concerted effort to diversify its board with the addition of three new board members and a new board President during the strategic planning process. The board will continue to use the board profile results to recruit and retain members who share the mission of the WCSA.

The budget reflects a small amount in Year One (\$5,000) for board development and reduced amounts in Years Two and Three (\$3,000 each). This allocation is essential to building WCSA's board to be a powerful entity for the charter school movement and ensuring that the board serves as a model for the type of governance expected from its member schools. The board used BoardSource materials during the strategic planning process and will continue to do so.

The new President has experience in fund development and will challenge the board and new Executive Director to join him in a renewed effort to raise half of the organizational income from private or government grant sources.

Leadership

Upon availability of funding in 2012, the board will begin the recruitment process for a new Executive Director that has expert knowledge about charter schools, especially the importance of independent, autonomous, quality schools. (Position Description and Executive Transition Plan attached, including scenarios based on funding levels).

The new Executive Director will lead a small staff, initially, building the capacity of the organization to meet the initiatives outlined in the strategic plan; he or she will have an opportunity to modifying the strategies, to some degree, based on his or her expertise and the realities of the charter school environment at that time.

Finances

WCSA expects a budget of \$354,000 in Year One, \$382,000 in Year Two and \$453,000 in Year Three. Budget attached.

WCSA has added an individual with extensive financial background to the board. This individual will assist WCSA in closely monitoring the mission toward budget and making fiscally responsible decisions tied to the strategic plan.

WCSA will continue to run the organization in a manner that produces a clean audit.

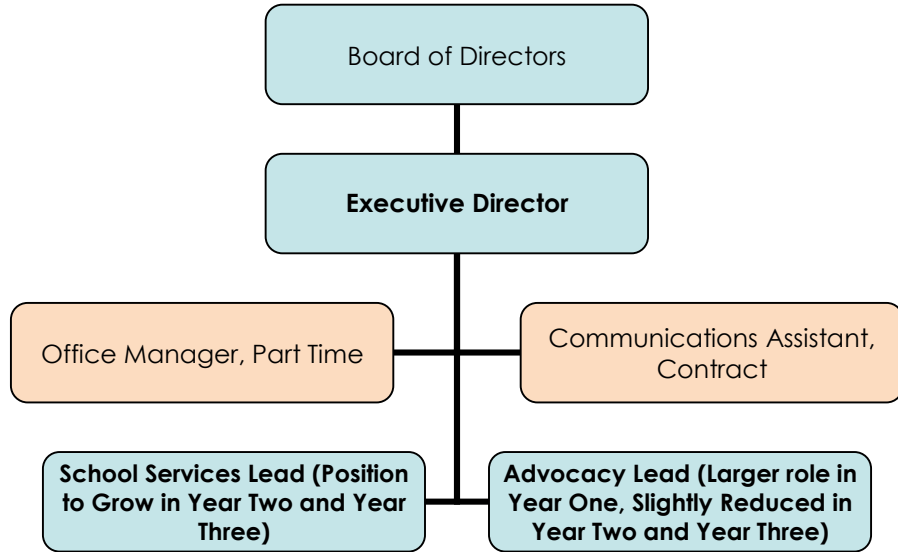
WCSA will diversify funding, specifically, as follows:

- WCSA will increase revenue through membership, either by increased fees, or increased number of eligible members (although WCSA will actually become more selective in its membership) by 33% each year.
- WCSA will increase revenue through fee-for-service by 100% between Years Two and Three.
- WCSA will increase grants from non-Walton funders by 60% each year.
- WCSA will increase the conference revenue by 15% each year, to yield net income of \$20,000 - \$30,000 each year.
- WCSA will increase Gala revenue by 10% each year, to yield net income of \$10,000 - \$13,000 each year.
- WCSA will increase "other revenue" from \$9,000 in Year One to \$22,000 in Year Three.

These goals are meant to serve as a guideline for the next Executive Director so that by Year Three no one funder contributes more than 33% to the organization's budget.

Staffing:

The Executive Director will be asked to hire, manage, and if necessary, terminate, his or her staff and consultants. The board proposes the following structure for 2012 to 2014, with modifications as needed, based on funding, market conditions, and demand for services.



Note: The Executive Director position description and transition plan is attached, including scenarios based on the level of funding acquired by WCSA.

Communications

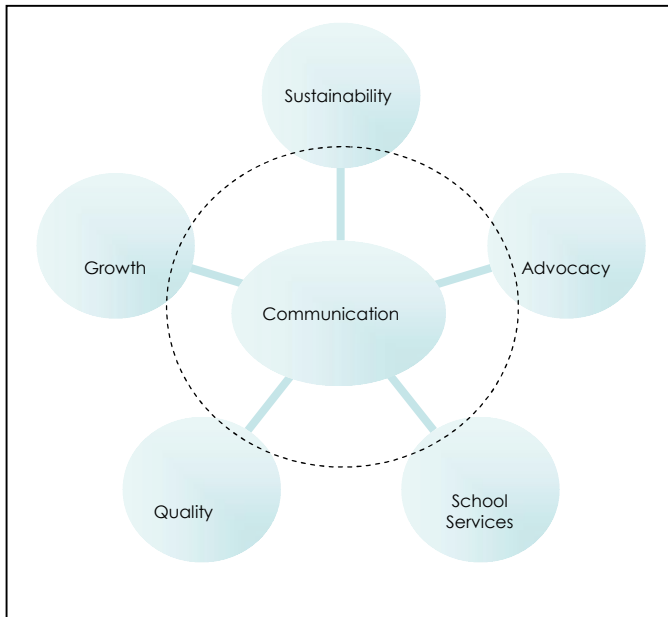
WCSA will treat communications as a strategy that is embedded in all of the work outlined above. The new Executive Director and Communications Assistant will generate a comprehensive plan to support the implementation of the strategic plan. At minimum, WCSA's communication efforts will:

1. Evangelize school independence, autonomy, and quality as the definitive organizational focus and messaging theme of the organization.
2. Leverage the resources of member schools and the broader network of allies to support charter schools (especially with rapid-response capacity when anti-charter legislation or stories appear).
3. Leverage partnerships to advance the advocacy and communications agenda with high-leverage funders and grassroots, business, civic, and policy groups.
4. Recognize the contributions of charter school pioneers, champions, and supporters through awards for school leaders, policymakers, volunteers, and schools—further deepening their ties to the movement.
5. Increase the visibility of WCSA, member, and non-member schools in the media and the positive portrayal of charter schools.

6. Use cost-efficient technology to the greatest degree possible to convey messages with immediacy and relevancy in the most desirable format for information consumers, be that via social media, webinars, teleconferences, video relays, etc.

Strategy Summary

In order to be successful, WCSA will have to be flexible and determined to reach the goals outlined above, while taking care not to over-commit to members or other stakeholders. The budget estimate is very conservative but new opportunities may arise that allow WCSA grow more quickly, instead of incrementally. The following diagram summarizes the WCSA strategies for 2012 to 2014.



CONTACT: WCSA (414) 215-9272
www.wicharterschools.org

VI. Budget

WCSA expects a budget of \$354,000 in Year One, \$382,000 in Year Two and \$453,000 in Year Three to fulfill the strategic plan, according to the detailed budget provided below:

BUDGET	Y1	Y2	Y3
REVENUES			
Membership Dues	\$13,000	\$17,290	\$22,996
Fee-for-Service	\$15,000	\$35,000	\$70,000
WFF Grant	\$200,000	\$170,000	\$150,000
Other grants	\$30,000	\$48,000	\$76,800
Conference	\$60,000	\$69,000	\$79,350
Gala	\$27,000	\$29,700	\$32,670
Advertising & Vendor programs	\$6,000	\$7,800	\$10,140
Other income	\$3,000	\$6,000	\$12,000
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EXPENSES			
Salaries (FT ED and PT Office Mgr.)	\$120,000	\$124,800	\$129,792
Benefits and Insurance	\$33,600	\$34,944	\$36,342
Advocacy (contracted position)	\$40,000	\$30,000	\$30,000
School Services part-time or contracted??	\$5,000	\$25,000	\$60,000
Communication (contracted position)	\$15,000	\$15,000	\$15,000
Bonus pool	\$2,000	\$3,000	\$4,000
Subtotal for talent	\$215,600	\$232,744	\$275,134
Conference expenses	\$40,000	\$46,000	\$52,900
Gala expenses	\$17,000	\$18,700	\$20,570
Regional Events and Workshops	\$2,500	\$3,500	\$6,000
Marketing and Member Outreach	\$12,000	\$12,000	\$12,000
Website/social media	\$500	\$1,000	\$1,000
Professional Development	\$1,500	\$2,000	\$2,000
Board Development	\$5,000	\$3,000	\$3,000
Lobbyist	\$3,000	\$0	\$0
Accounting and audit	\$4,000	\$4,200	\$4,500
Bookkeeper	\$1,500	\$1,800	\$2,000
Payroll fees	\$1,300	\$1,365	\$1,433
Charter School Rally/Week	\$0	\$0	\$10,000
Research and data analysis	\$0	\$4,000	\$6,000
Travel	\$5,500	\$6,000	\$7,500
Meals & Entertainment	\$2,000	\$3,000	\$3,500
Computer hardware and software	\$4,000	\$1,000	\$1,500
Insurance	\$3,400	\$3,570	\$3,749
Dues and subscriptions	\$3,000	\$3,000	\$3,600
Office Equipment and Supplies	\$3,000	\$2,500	\$2,500
Printing and Copying	\$5,000	\$5,250	\$5,513
Copier Lease & Maintenance	\$3,000	\$3,150	\$3,308
Telephone and Internet Access	\$3,000	\$3,150	\$3,308
Postage and Shipping	\$4,000	\$4,200	\$4,410
Furniture	\$3,000	\$1,000	\$1,000
Bank Fees and Finance Charges	\$1,200	\$1,260	\$1,323
Rent	\$8,000	\$12,000	\$12,600
Utilities	\$1,000	\$2,000	\$2,100
Security, Custodial, etc.	\$1,000	\$1,000	\$1,000
Subtotal operations	\$138,400	\$149,645	\$178,312
TOTAL	, - . /111	, - 231- 25	, / . -1/ /6