



## Appendix: Responses to Charter School Directors' Survey

As part of this research project, Utah Foundation conducted a survey of charter school directors. The survey asked questions about their concerns on costs, revenues, administrative and personnel issues. The survey also assessed their opinions on facilities and funding adequacy.

The survey responses provide a great deal of insight into the challenges facing charter schools. Utah Foundation was not able to incorporate all of the survey information into this research report, but it is valuable in assessing charter school's financial and administrative challenges. Therefore, we include the entire set of responses from the survey in this appendix. Some of the open-ended answers have been modified to preserve anonymity or to combine responses when more than one respondent had similar answers.

The survey was conducted online, using a service provided by zoomerang.com. Charter school directors were invited by email to participate. Charter schools in operation by fiscal year 2004-05 were included in the survey. Of the 26 schools invited, 17 participated in the survey.

### Concerns about costs

**Which of the following cost areas present the greatest concerns or problems as you manage your charter school?**

	Number of Responses by Rating					Avg (Mean) Score
	1 Not a Problem	2 Minor Concern	3 Moderate Concern	4 Pretty Important	5 Very High-Level Concern	
Personnel costs - benefits	12%	0%	24%	24%	41%	3.8
Facilities costs – initial costs and lease costs for buildings and grounds	6%	12%	24%	29%	29%	3.6
Administrative costs – complying with state rules, managing finances, and running the “business” of the school	18%	6%	12%	29%	35%	3.6
Curriculum and other instructional purchases	6%	24%	12%	29%	29%	3.5
Personnel costs – salaries	18%	6%	24%	29%	24%	3.4
Equipping the school – desks, computers, libraries, etc.	12%	29%	18%	41%	0%	2.9
Operations and maintenance – utilities, insurance, janitorial, etc.	18%	18%	29%	29%	6%	2.9

**Please provide one or two ideas for addressing your highest rated concerns on cost issues.**

- We are in need of a better administrative budget; transportation funding would be useful
- Our school would be more financially secure if we reverted to the old way of funding—before we lost the local levy funding and changes in the WPU structure.
- Continued receipt of funding for specific programs such as the Federal Facilities Incentive grants, more start-up money for larger schools (as was appropriated by the legislature this year)
- Administrative Costs - we need the state to adjust the funding formula to reflect current charter school enrollment and be formula-driven for future growth. It would be wise for the state charter board to pursue additional facility financing grants. These make a big difference in being able to afford a suitable facility.
- Being able to focus more on curriculum would be nice—however there are so many other things that demand attention as well. Being able to obtain assistance (even without having waivers) would be helpful.
- Additional state funding
- Receive Capital Outlay money
- I am concerned about the effect removing the cap on the number of charters each year will have on the amount of money available. Charter schools already operate with a slashed budget and controlling growth wisely without hampering choice, or increase the amount of money we have to work with.
- Overall I do not have enough money to run my school; this forces me to make hard decisions and to do a lot of fundraising

**Concerns about revenues**

**Which of the following revenue areas present the greatest concerns or problems as you manage your charter school?**

	Number of Responses by Rating					Avg (Mean) Score
	1 Not a Problem	2 Minor Concern	3 Moderate Concern	4 Pretty Important	5 Very High-Level Concern	
Administrative funding (administrative WPU, etc.)	0%	6%	18%	29%	47%	4.2
Differentiated WPU	12%	12%	18%	41%	18%	3.4
Restricted and special populations program funding	6%	12%	41%	29%	12%	3.3
Donations and grants	12%	12%	35%	18%	24%	3.3
Minimum School Program and other general revenues	18%	18%	18%	24%	24%	3.2
Startup funds	29%	6%	18%	29%	18%	3.0

**Please provide one or two ideas for addressing your highest rated concerns on revenue issues.**

- Differentiated WPU is necessary (1.2) for high schools given the costs associated with a high school program. However, elementary or middle school programs should NOT be competing with charter 9-12 programs. Fund them at 1.0 and high schools at 1.2
- Provide more funding for administrative funding and take away differentiated WPU.
- IDEA money needs to be paid the first year. Startup funds need to be consistent and sufficient and based on enrollment.
- MSP is the bread and butter; it needs to be increased to meet the national average!
- It is difficult to operate the school with current funding and lack of facilities for student growth. We are forced to seek funding from private sources to fill in where the state fails to provide support. We need help with finding and securing private money.
- Lengthen start up funding to 5 years (instead of 3) so that the school has an opportunity to get through their first accreditation renewal and create a positive legacy.
- Administrative cost funding is by far the most looming.
- NCLB funding requirements (in regards to flexibility) isn't clear. Having more information regarding this would be helpful so that we aren't in violation of any state or federal requirements.
- WPU's pay for our program. We need to work on grants and donations.
- The efforts of Patty Murphy at USOE are to increase administrative funding are just what charter schools need.
- There is minimal administrative funding.

## Concerns about administrative issues

**Which of the following administrative areas present the greatest concerns or problems as you manage your charter school?**

	Number of Responses by Rating					Avg (Mean) Score
	1 Not a Problem	2 Minor Concern	3 Moderate Concern	4 Pretty Important	5 Very High-Level Concern	
State reporting obligations	18%	12%	12%	41%	18%	3.3
Knowledge of proper procedures	18%	18%	18%	24%	24%	3.2
Teacher licensing	18%	18%	18%	29%	18%	3.1
Politics and government relations (state and local government issues)	12%	35%	12%	24%	18%	3.0
Public relations – dealing with the community	24%	24%	24%	18%	12%	2.7
Teacher retention	29%	18%	24%	24%	6%	2.6

**Please provide one or two ideas for addressing your highest rated concerns on administrative issues.**

- District seniority keeps strong teachers from considering charters; retirees and new hires are a good blend. But mid career teachers would be sacrificing a lot to teach at a charter.
- I don't feel we have sufficient access to the political process We need to elect better representation for us. Guaranteed funding for TAPCS to provide help to charters is essential.

- Charter school teachers should be free from state-level licensing requirements.
- Increasing the number of qualified professional staff at the Charter School Office and in USOE finance is needed.
- Need clearer reporting requirements
- I am concerned about the rapid increase in the number of charter schools—feel that it is making us compete against each other for funding.
- Attendance at state director meetings is a must. If a school does not consistently have some form of representation at meetings—there should be consequences. Not attending meetings creates problems in lack of information. People seem to have a fear of admitting they don't know the answers to things.
- Encourage people to rely more heavily on John Broberg and the people at TAPCS
- The training that USOE provides is excellent, and they are always willing to help me and answer my questions.
- It would be easier to staff our school if we could use more professionals that aren't necessarily certified to teach--this is especially a concern in the performing arts.

## Facilities Issues

### *What type of facilities do you occupy?*

	Number of Responses	Response Ratio
Facilities were built for our school	2	11%
Previously existing school building	2	11%
Former Commerical Space	9	50%
Former Residential Space	1	6%
Other, Please specify	4	22%

Other includes: Jewish Community Center, Rent space from a local high school, portable buildings

### *Why did you choose your facilities (check all that apply)?*

	Number of responses	Response Ratio
Facility space was donated	1	6%
Cost was favorable	10	56%
Space was available	12	67%
Location was desirable	11	61%
Other, Please specify	1	6%

Other includes: Ogden city partnered with us

### *How satisfied are you with your current facilities situation?*

	Number of responses	Response Ratio
Definitely satisfied	6	33%
Somewhat satisfied	7	39%
Neutral	3	17%
Somewhat disappointed	2	11%
Definitely disappointed	0	0%

**How does your facility impact your school's attractiveness to students?**

	Number of responses	Response Ratio
Definitely positive	7	39%
Somewhat positive	5	28%
Neutral	4	22%
Somewhat negative	1	6%
Definitely negative	1	6%

**Please rate the following facilities challenges for your school.**

	Number of Responses by Rating					Avg (Mean) Score
	1 Not a Problem	2 Minor Concern	3 Moderate Concern	4 Pretty Important	5 Very High-Level Concern	
Classroom space	18%	6%	18%	29%	29%	3.5
Office space	18%	12%	18%	35%	18%	3.2
General maintenance	12%	12%	53%	18%	6%	2.9
Library books	18%	29%	18%	18%	18%	2.9
Computer labs	18%	24%	29%	24%	6%	2.8
Grounds/outdoor facilities	12%	24%	47%	12%	6%	2.8
Library space	29%	12%	29%	18%	12%	2.7
Classroom computers	12%	53%	6%	24%	6%	2.6
Other (describe below)	59%	12%	6%	12%	12%	2.1

**If you rated "other" highly in the question above, please describe the other major facilities and equipment challenges you have.**

- We need to add more classrooms: history, biology and art.
- Our space isn't big enough for the number of students that want to come here. Our challenge is to raise enough funds to add classrooms and office space.
- We would like an indoor PE area and a lunchroom designated just to lunches. We also need a large meeting room.

**Do you use other facilities in the community regularly to meet the needs of your students and school activities? For example, do you use community recreation centers for gym classes, art centers for art classes or different spaces for music classes?**

	Number of Responses	Response Ratio
Yes	4	22%
No	14	78%

**How would you rate the adequacy of federal startup (PCSP) grants your school has received?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Generous	0	0%
Ample	8	44%
Somewhat Deficient	10	56%
Definitely Deficient	0	0%

**How many times have you moved location of your school over the life of its charter?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
0	10	56%
1	6	33%
2	1	6%
More than 3	1	6%

**Is there room in your current space to accommodate increased enrollment?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Yes	5	28%
No	13	72%

**Which of the following describes your facility financing?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Month to month rent	1	6%
Lease	13	72%
Purchase (loan/mortgage)	2	11%
Lease to own	1	6%
Donated	0	0%
Other	1	6%

Other includes: construction of new building this summer (was not specific on financing method)

**If you lease your facility, for how many years is the lease term?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
<b>Length of Lease (Lease terms)</b>		
Year to Year Lease	5	29%
2-5 Year Lease	3	18%
6-10 Year Lease	2	12%
11-20 Year Lease	5	29%
21-30 Year Lease	1	6%
Other	1	6%

Other includes: Lease is valid as long as school is in operation.

**What is the annual lease, rent, or loan payment for your facility?**

1. \$10,000
2. \$75,000
3. \$15,000 lease changing to \$26,000 when facility is purchased
4. \$183,000
5. \$256,596 plus CAM \$48,000
6. \$2,450
7. \$26,400
8. \$215,000
9. Variable terms; ranges from \$14,000 to \$23,000 (monthly)
10. \$174,000
11. \$30,854
12. \$3,700
13. \$100,800
14. \$98,400
15. \$350,000 and \$216,000 (EHHS and FFCHS)
16. \$21,000
17. \$264,500

Note: Some of these answers are likely monthly amounts, rather than annual.

**If you were interested in purchasing a facility, how would you prefer to finance a school purchase?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Lease to own	1	6%
Obtain mortgage from bank or other private sector lender	1	6%
Obtain state financed loan	8	44%
Issue some type of revenue bond	1	6%
Not interested in purchasing a facility	2	11%
Other, please specify	5	28%

Other includes: Buying property outright, USDA guaranteed loan, no preference between private mortgage and state financed loan.

**Finances**

**In raising additional funds outside of your state and federal allocations, how important are these additional funds to your school?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Vital	6	35%
Important	6	35%
Nice to Have (But can get by without them)	3	18%
Not active in fundraising	2	12%

**How has the differentiated WPU funding affected your school and your ability to provide programs to your students?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Definitely Positive	4	24%
Somewhat positive	4	24%
Not Much on an Impact	4	24%
Somewhat negative	4	24%
Definitely Negative	1	6%

**What kinds of adjustments have you made to your budget and operations as a result of the differentiated WPU funding? (Check all that apply)**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Reduced staff	2	12%
Increased staff	4	24%
Reduced purchases of educational materials and services	3	18%
Increased purchases of educational materials and services	4	24%
Increased outside fundraising to make up for lost funds	0	0%
Reduced educational activities	1	6%
Increased educational activities	4	24%
Reduced extra-curricular activities	3	18%
Increased extra-curricular activities	1	6%
No significant impacts	6	35%

**What percentage of your administrative costs is covered by the state's administrative WPUs for charter schools?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
0-5%	5	29%
6-10%	3	18%
51-75%	1	6%
90-100%	4	24%
Admin performed by district	1	6%
Unsure	1	6%
Other	2	12%

Other Includes: "Small", & "Good Question"



**How much of your administrative work is performed by volunteers? (Estimate the percent of time or work performed)**

	<b>Number of Responses</b>	<b>Response Ratio</b>
0 % (none)	8	47%
5%	4	24%
10%	3	18%
Unsure	1	6%
Other	1	6%

Other Includes: Only a few hours but may change in the future

**Would you support the creation of some centralized agency, network, or organization to assist your school with administrative tasks?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Yes	11	65%
No	6	35%

**In your opinion, what tasks should be centralized between charter schools?**

- Special education services
- Testing
- Data collection
- Purchasing
- “Cactus” teacher credentialing system
- Teacher licensing completion
- Health insurance packages
- Administration
- Finance
- Curriculum
- Merge charter schools under one non-profit umbrella
- State reporting
- Payroll
- Substitute teachers

## **Staffing Issues**

**What effect does your level of pay and benefits for teachers have on your ability to recruit and retain a well-qualified teaching staff?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Definitely gives us an advantage	2	13%
Moderate advantage	4	25%
Neutral (We're about the same as other area schools)	8	50%
Moderate disadvantage	2	13%
Definitely disadvantaged (We cannot compete based on compensation)	0	0%

**What percentage of your teachers are recent graduates or new to the teaching profession (less than 2 years experience)?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
0-5%	1	6%
6-10%	1	6%
21-30%	2	13%
31-40%	1	6%
41-50%	3	19%
51-60%	3	19%
71-80%	3	19%
81-90%	1	6%
91-100%	1	6%

**On average, what percentage of teacher turnover has your school experienced on an annual basis?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
0-5%	5	31%
6-10%	5	31%
11-20%	1	6%
30%	1	6%
45%	1	6%
80%	1	6%
Other/Don't know	2	13%

**How do you provide retirement benefits to your teachers?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Utah Retirement System	5	31%
Private Accounts (401K, 403b) with payroll deductions	8	50%
Private Accounts (SEP-IRA's) with a lump-sum payout at year end	1	6%
We do not provide retirement benefits	2	13%

**What percentage of teacher salary does your school contribute for retirement benefits (only the employer portion – not the employee's own contributions)?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
None	2	13%
1-5%	1	6%
6-10%	3	19%
11-15%	5	31%
Variable	1	6%
Fixed stipend	1	6%
Other/Don't know	2	13%
District pays	1	6%

**How do you provide health insurance benefits to your teachers and staff?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Utah Public Employees Health Program	4	25%
Private Health Insurance	8	50%
Professional Employer Organization	3	19%
We Do Not Provide Health Insurance	1	6%

**Please calculate your health insurance costs as a percentage of total salaries and wages.**

	<b>Number of Responses</b>	<b>Response Ratio</b>
None	1	6%
1-10%	2	13%
11-20%	5	31%
21-30%	1	6%
31-40%	2	13%
41-50%	2	13%
Don't know	1	6%
Variable	1	6%
District pays	1	6%

**Would you be interested in participating in a pool of charter schools for health insurance, retirement, or other employee benefits?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Yes	13	81%
No	3	19%

**Is it a problem for your school to find substitute teachers?**

	<b>Response Ratio</b>
Yes	50%
No	50%

**From where do you obtain most of your substitute teachers?**

	<b>Number of Responses</b>	<b>Response Ratio</b>
Local school district's list	1	6%
Our school's parents	7	44%
Developed our own list (generally not parents)	7	44%
Other	1	6%

Other Includes: Kelly Services