

ALEX MEDLER: We have a small number of people attending now, which is great. We can have a focused conversation. And I'd invite everybody to feel free to speak and interject throughout. We'll get underway now.

Let me just handle a few logistical issues. Go ahead and mute your phone if you're not talking, but then feel free-- we're not muting anybody centrally. So if you want to say something, just go ahead and unmute your phone and go ahead and talk. Feel free to interrupt and ask questions throughout.

The main purpose-- the first purpose today is to make sure you're familiar with everything that's in the dashboard and you know how to navigate it so you can explore it yourself. But the second goal, to the extent we have feedback today, is we'll go ahead and capture your feedback and input and suggestions. So number one, make sure you know how this all works. Number two, get your feedback and also chat about how you might use it a bit.

This is Alex Medler. I should have introduced myself. I'm with Safal Partners, which runs the National Charter Schools Resource Center, heading up the project to do these dashboards. And with me from Safal is Sarah Hamshari, who you should all know.

If you have any technical problems as we proceed, you can put something in the chat for the Q&A function. You can also email Sarah while we're talking. I probably won't be able to see my email. So if you have something where it's not working, please give Sarah a quick email or use the chat function.

And this will probably take a little over a half hour, but we can take longer as people need. As long as we have a small group, how about if people go and introduce themselves and we find out where everybody's from who's on the phone today. This is Alex Medler. I'm sitting in Boulder, Colorado with Safal Partners. Who else do we have?

KRYSTAL: Hi, I'm Krystal Starwich. I'm calling from Washington state.

MARK FRANCIS: Mark Francis calling from Arizona Department of Education in Phoenix, Arizona.

ELLEN ROBERTS: Ellen Roberts calling from Colorado.

ALEX MEDLER: Anybody else? All right, well, as I said, if anybody is interested in-- as you have questions or

comments, please go right into sharing. And I will dive in with our presentation.

Mark has volunteered to share to let me use the Arizona dashboard as our example today. One of the reasons I wanted to use it is they have actually made more subgrants over the last few years. And so the data is a little more complete.

So let's move forward. If you're not talking, especially if you're taking notes or something, make sure to mute your phone so we don't get too much keyboard information. Sarah, anything else logistically before we dive into the rest of the material?

SARAH

HAMSHARI:

The only other logistical thing is that we'll have a survey at the end. And we'd really appreciate if you all could fill that out and provide any feedback on this webinar and what you'd like to see in future webinars.

ALEX MEDLER:

OK, thank you. And let me share my screen. You should be able to now see the copy of the dashboard for Arizona. And what I'm going to do is give you a brief introduction, and we'll work through all the tabs that are at the bottom. So you look at the Quick Facts and the Subgrant map, et cetera. And I'll just show you the functionality of each piece, and then we'll have time for comments or questions.

So everybody with a grant from '15 or '16 should have received an email with a link to their own state dashboard. We'll have a navigation page that allows people to go back and forth between different states. But we want to vet it first with each of you. Oh, and if-- someone's taking notes on a keyboard or writing on a keyboard with their mute open. So if you could mute, that would be great, if you're going to use your keyboard.

Anyway, let me put it on the full screen for you. So each state will have a page like this. A few things to bring to your attention-- the SEA Snapshot is a little box that has the basic information on the grant period, the total funding you received, and also a sense of the state's charter school sector in terms of schools and enrollment.

The graph at the bottom is intended to show you how big the state's CSP program is compared to other states. So you see Arizona in orange. And they have received-- if you roll over it-- something in the order of \$70 million since 2009 for their charter school program. So if you roll over any of these graphics, as you'll see, data will pop up on them.

That graph at the bottom is just sort of basically give you a sense of the scale of Arizona's charter program and how it rates to other states. The Grant Summary is a text document that

we've prepared at Safal Partners that is designed to be comparable across states. And it's based on the abstracts for the grant proposals that are on the website of the feds. If you click on this link, you'll actually go to the site at the US Department of Education where the initial abstract is located.

If you click on the links up here at the top, one of them will take you to a copy of the definitions of each of the terms, data sources, and an explanation of each tab. So whatever tab you want, you can click on this upper link box here on the left to go to an information page. And you can click on the Navigation page and it will take you back to the place where you can select states.

And on the right of this page is a map of the subgrantees that are covered in the state. And we'll get to more detail on this. This is sort of just to show you a little bit of the geographic distribution. I should say any graphic or figure or table can be expanded in its upper right corner. You should be able to reach this thing that says Focus Mode. If you click on that, you can get a full screen of that particular graphic, if that's what you'd like to see. And then you return back by just pushing Back.

Are there any questions about the Quick Facts page or some comments? OK. And I should say-- I should have said upfront that all the data from this comes from data that the states are already currently report to the US Department of Education, either directly through their APRs, through their application, or through the WestEd data collection that happens.

So we've had questions electronically about, well, how quickly or when would this be updated? We will post information that explains what the data-- what it's date is, like this is data based on the best data from March 2017 or something. So we will date the data. It's based on data gathering that already takes place. And one of the issues that might come up later is, what would be the cycle for updating data.

The US Department of Education's intent is to gather feedback now through this process. We'll make any corrections or adjustments based on it to create a final that will go back to the department for final vetting. And then after they have a chance to clear it, then this would go public, eventually being available to people. And then we would hope to work with the states to make this available to people in your state who would want to review the information.

Any comments or questions there? OK. And Sarah, any questions on the chat because I can't see my chat screen.

SARAH

No, I'll let you know if we have any.

HAMSHARI:

ALEX MEDLER:

OK. So if you go to the Subgrantee Map, this includes a table, a graph, and a map. The table in the upper left presents basic information on all the subgrants that have been awarded. This information is taken from the WestEd data reporting.

And I should say, there are some consistencies across states and how people use the WestEd data tables. So we've tried to make-- we said Estimated Award Totals in the box because in some cases we're trying to interpret how the columns are used. For example, states are not consistent in how they treat planning versus planning and implementation or how they treat commitments versus awards in the data. So that might be an issue we need to discuss with you in the future.

In terms of the three different functions, I just want to illustrate that each of them are interacting. So if you click on the Academy of Math and Science Camelback, it shows up both in the map where you can roll over it and get more information about its details, and it also affects the graph so you see the contribution of this award by the one school. If you want to go back to seeing all of them, you can click on the larger group, and then the graph, the table, and the map respond.

If you roll over an item on the map, you can then see the details that are in the data set for that particular grant. And depending on the state you're in, it might help to focus on a place like around the Phoenix area. But it might be useful to look at the entire state to see the concentration of grant awards.

So this map can zoom in and out. Sometimes when you go back and forth, it will be way too big or small to be useful. And then the individual grants are broken out for the recipient based on implementation and their planning by the color. Any questions there, or thoughts?

One of the questions I think we had from the field was, if you make new awards and haven't gone into the WestEd data reporting, would there be a way to update that data? And that's something we need to consider how to do it in a way that's not dependent on cost and viability for what this schedule could be for updating data. So we don't know the answer to that, but it's a good question.

If you move onto the Subgrant Enrollment Data, this is also from the WestEd data. And it's not

just enrollment, it also gives you the status of the schools. So you see in the upper left the box on those that are supposed to open in the future, those that have already opened, or some that will not-- aren't expected to open.

The graph below gives you the fiscal year that the awards are made in. So for example, if someone wanted to know, what award has been granted that didn't actually end up opening? Again, you can click on it and see that the Academy of Math and Science in Mesa got a grant but then did not draw down the funds and wouldn't be expected to open. Again, if you wanted to see everything from a one year, you could look at the 2016 enrollment data or click on whole thing and get the whole set.

Again, if any of these things are too small to see, you can go back and forth. And you can click on any individual school to find out what its contribution is to the other graphs. Any comments or questions there? And, Mark, since this is Arizona data, are there any comments for the group about what you see in the data or whether this works to explain the Arizona context?

MARK FRANCIS: Well, I can say that it's accurate. I mean, it's what we submitted to the data collection, and you've created a visual representation of what it is.

ALEX MEDLER: Great, OK.

[INTERPOSING VOICES]

MARK FRANCIS: It's easily accessible to me.

ALEX MEDLER: And have you had a chance to go through-- we're hoping as people have feedback-- there's so much data in the WestEd data that we're not really in a situation to confirm individual data points for an individual school. But we are looking to the states to provide this feedback if something looks wrong.

If you know that there's something that may have been entered wrong into the data set or if we've-- and particularly if we've interpreted how you use the columns and the data wrong, we would need to straighten that out. So if you can, give it a review. We realize there's a ton of data. And we're sort of stuck by either seeing something that obviously doesn't make sense or by just working with the data that the department has or that WestEd has collected.

MARK FRANCIS: I'll only say is that the report-- like the screen that you have on for the 2015-16 and the 2016-17 school enrollment reconciles with the data report that we sent to WestEd.

ALEX MEDLER: That's our hope, and that should be the case. If anybody sees something that doesn't, then that's an error that we should check out. One of the things that happens most frequently in the data that leads to dropping data is when the data set is supposed to have a numerical value in it and people have instead inserted notes about particular items. Stuff like that can lead a school to drop out of the data.

Moving on to the Budget tab, we're trying to show a few different things, thinking about it from a field perspective. On the left is basically the funding from the Feds to your state. So you get that Arizona got a \$23.6 million dollar grant and that they have about 7.8 or 7.9 per million per the year of the grant.

And then you see to the middle of that \$23 million, they have, as reported thus far, \$6 and 1/2 million of obligations that have been made out in the wards. And then the graph on the right is of those awards to get what has been implementation and what has been planning by each year.

And those are the awards that year. So a school might be getting a planning in 2015 and then we'll have, ideally, an implementation grant in 2016. So those are treating each year's award as a separate award, which I realize is a bit of a subtlety that may be hard to explain in the field. Any comments or thoughts on this page, or even about that issue of how to handle the multiple, quote, awards for a single school?

MARK FRANCIS: Only to comment that of the \$23 million plus dollars-- this is Mark again in Arizona-- is for anyone who's somewhat new to this, we're making awards in year three right now, but it's a three year grant. So we're going to have two no-cost extension years.

So really that \$23 million is distributed over a five year period. So if it looks like, wow, they got \$23 million, but they've only spent \$6,500,000 of that, this is-- you need to think of this as ultimately-- at least the way we run it-- as a five year program with two no-cost extension years.

ALEX MEDLER: That's an excellent point and likely to be consistent across lots of states. Do you think it would be a better visual presentation on the graph to the left to maybe do anticipated year 4, anticipated year 5 based on no-cost extensions that are basically being planned for already?

MARK FRANCIS: It-- for this-- trying to think this through. The point is, is that the awards are made.

ALEX MEDLER: But you have more years to spend it.

MARK FRANCIS: And then that-- and those are the three years that they do that. And then this is how much we've spent in 2015 and 2016. Everything else would be estimates. In other words, this is hard data.

ALEX MEDLER: As opposed to planning.

MARK FRANCIS: Yeah.

ALEX MEDLER: Well let's-- we'll come back to that. We'll make note of that. Any other questions or comments or suggestions for the Budget page? And again--

SARAH It looks like we did get a question, Alex.

HAMSHARI:

ALEX MEDLER: Oh, please--

SARAH How often will the data be updated by NCSRC? SEA is submitted annually, so how will that
HAMSHARI: affect the dashboard?

ALEX MEDLER: So the current plan is to use those official submissions without adding a data submission to the state and also having a more practical use to say that this is the data for last year. We are-- several people have asked about this and have an interest in updating it. We'd have to talk through with the department their interest in doing that, how to do it in a way that doesn't duplicate or add burden to the existing data collections, or making sure that it is secure.

So we could easily imagine for the next version of this that we create a secure portal where people could upload data in a particular format, if they want to, earlier. And that that could, in a relatively straightforward fashion, update this, like on a quarterly basis or as people do it.

But we're going to have to have that discussion later with the department in terms of how they would like to proceed. There's lots of different technical approaches. But the short answer is, currently, this would be based on the best available data from annual submissions that already take place. But that's a great question for ongoing discussion.

If I can move onto the Logic Models. So one of the priorities for the department was to make sure that the logic models are shared and available, and in part because people use them as a good summary of how the state thinks their whole program works. So the same reason they

are useful as a strategic planning tool, are useful to communicate what you're doing.

What we've done thus far is pretty much cut and paste a picture of the state's logic model. We've done a little pasting because sometimes on the applications they split pages and stuff. So please do look at your logic model as it's presented and see if we have done it correctly.

We have a little text on the left side that explains what logic models are. And if you click on this link on each page, it should take you to the application that was submitted to the Feds. And when it's finally done downloading, it will take you to the page-- in this case, the pages-- where the logic model is housed in your application. This also lets people see it within the context of the text.

Please do explore all those links. Folks in Colorado had their software and configurations made it so that all those links didn't originally work. So we've been trying to fix that to make them more accessible depending on your software configuration. So the review here, to summarize, please make sure that we have captured your logic model accurately. Check and see if the embedded link works for you.

And I would be remiss if I didn't say, from the department, they are very interested in states updating these, in which case you'd have to work with your program officer to make sure you have a final logic model that is approved and on record. And we'd, again, be happy to upload updated logic models as people improve them. Some of the states have ones that the department has found to be less helpful in terms of explaining their program.

Any questions on the Logic Model page? Sarah, let me know if there's any more on the Q&A.

The next page is also taken from the official reporting. It covers the performance measures that you have. It works them out by objective, and then the performance measures score those objectives. In some cases we have had to add a little bit to the numbering system to break them out.

One feature that's interesting, and this may be useful to you, is that you can click on one objective on the top and break out just the performance measures for that objective. And so you can scroll through if the whole table is a little overwhelming. Note that it includes the GEPRA measures which are consistent across all the states. So there's just one set there.

Another thing I would explain is that, in this iteration we started collecting data on targets and other information. But they were not consistent across the states.

So at this level, we are planning to not list the performance targets by year or data that has returned, but we would expect, perhaps in next year's iteration or going forward, to be able to break out the performance targets for each year of the grant and a data that's available on what you've reported in terms of performance on them. And again, this would come from the annual-- the APR process and hopefully be up to date with the current versions of the performance measures themselves.

When you do review this, please do note if we have made any formatting or editing errors as we've tried to cut and paste. We tried to make them consistent, but this has been a cut and paste process, and we might have introduced an error that misrepresents what you had as a performance measure. Any questions or comments on the performance measures?

Then the tab that does not come from your federal reporting is the one on the Charter Landscape. And what we've done here is gather information from other sources. You see on the SEA snapshot that it does give you the basics on the grant period and the total CSP funds. But the remainder of the information is not just about the charter school program, but it's about all the other information about your state's charter school setting.

The four graphics there-- each you can roll over them to find out what the data is behind the graphic, and that works for all the data in all these charts. Each of the charts can be opened up to be looked at for one page. And you can come back to them.

And you do get-- the upper left is the opens and closures by year. The upper right is the student demographics. Lower left is the geographic location in terms of urban or rural or town. And the bottom right is the split of EMO and CMO data.

With the exception of the EMO CMO data, which comes from the WestEd data collection, the rest of the lot of this comes from other sources. So if you click on the instructions and additional information for this page, you will get a summary of where they're coming from and actual links to the reports that this data is drawn from.

The department, in their initial feedback on this page, has asked that we explore how to add additional information about the authorizers in each state so that people would know, well, this is-- like California has 300 authorizers. They're almost all districts or counties. And Arizona has districts in the state charter board, and what's the ratio of the distribution of schools between them.

So there is other key information that explains what's different about a state that Stefan wanted to make sure we can communicate and share. And this is a good opportunity of input on this topic if there's something that you think is a more important piece of information to share or a data source that might be better to tell the story of your state. Any questions or comments on the Charter Landscape page?

OK, moving on to one that we haven't really finished constructing yet. One of the key priorities for the department is talking about the state's dissemination activities. We are in the process of summarizing, encoding, and cutting and pasting the dissemination plans in the grant applications.

So this page, when it's done, would offer a bulleted summary of the types of dissemination activities that your state has-- for example, running a dissemination grant program, partnering or running a charter school conference, our webinars, and stuff like that. And then we'd have a bit of a coding that allows comparison across states to say who's got grants, who does conferences, that sort of thing. But that's still under construction as we continue to code the data.

Well, let me pause there. Those are each of the tabs that we currently have and each of the data elements. And I think I've walked you through just about all the functionality of each of the pieces. Does anybody have any logistical questions first, or comments? And then let's go and see if anybody has any other feedback they want to share today. So does anybody have any questions about how to use this or how to navigate it and maneuver around it?

All right, and feel free to contact us afterwards by either email or phone. And please respond to the survey when we're done, and know that we are hoping to have electronic feedback from all the states next Monday by December 4. We can, of course, get it earlier and will still listen later and try to accommodate it. But in terms of our process and summarizing feedback and giving it to the feds and acting on it, we're aiming for Monday, December 4, to get feedback from the states.

With that, let me just open it up to any more comments, feedback, or questions. Anybody?

YOLANDA: --hear me?

ALEX MEDLER: Yes, go ahead.

YOLANDA: All right, so the question that I have-- and I see how Arizona's is working on the quick facts and then you have the map that's attached to that. If you reviewed your data that was sent and it says data available from US Ed, there's nothing yet there up in awards. Would that be up-- if you want feedback by December 4 and there's nothing there, then how do we give that feedback?

ALEX MEDLER: Several of the states, the current reporting to the feds doesn't have subgrant award information yet. And so from the last data collection at WestEd, they didn't have awards for us to include. So you won't be able to vet it. But if in the meantime, you have run competitions that you want included that's good feedback to say, even though it's not in the WestEd data, we would like this to reflect our most recent awards, how do we do that? That's, I think, feedback we've gotten from a couple states.

A couple other states might look at it and say they don't want to do the extra data collection, they've already had it and it's maybe not worth the trouble. So if a bunch of states say, we would like to update this sooner, we have no data yet because it wasn't in last year's data collection, then that's important for us to talk to the department about and say, well, how should we proceed to do it on a more timely basis? Does that make sense?

YOLANDA: Yeah, it does. And that's-- I guess that was second part of the question. Because there's-- the reporting dates have kind of changed. So now we have the April dates and we used to be able to update our data collection sometime early fall.

So would the data in the dashboard reflect the revised-- like if there were any major questions when we're submitting our data collection that they-- either there was some missing information or some information just didn't make sense and that gets updated. Would that be the most recent information in the dashboard or just our initial data collection report?

ALEX MEDLER: So far, in the building of this to date, we're dealing with the most recent up to date comparable data. And there's different sources. So the budgets are different than the grant awards, which is different than the stuff that's taken from the application. So there's APRs, there's budgets, and there's the WestEd collection. Those are probably the three most regular single data collection sites.

And as we built it, we were getting the most up-- so when they had updated performance measures, they gave us updated ones even though they might have been updated after the original application. So in some cases, this version is the most recent official information. And

then logistically, we've had to set up to be able to pull from the annual reporting when it becomes available.

And the question about how to deal with the most recent data and how frequently is exactly one of the key questions to talk about with the department. So when you submit your written comments, please do both note that and also make your suggestion for how you would like it to be handled. Does that makes sense?

YOLANDA: Yep, totally. Thank you.

ALEX MEDLER: Do you think-- let me ask, too, and for other people. Do you think it's worth the trouble, both for you and for the department, to make this as real time as possible? Or is it more important to reduce the burden and just admit that this is as of February or something? What would people's input be?

YOLANDA: I think the As Of data is probably easier, just because-- you know, like Arizona was sharing-- Mark was sharing-- that we're in the process of doing RPs. We all do them at different times and so that's adding a little more to our plate, and we may not have the data on time. So an As Of date will let us at least plan of what's most recent and make sure that's most accurate and how we can get that information reported. I think that would definitely work.

And here's the other thing that I think this might be positive is that I can definitely use this-- this is Yolanda from Florida. So I look at everything in a compliance monitoring because that's what I do in my position here. And so this is a great way for us to even get our management companies and say, hey, we're recording this publicly. If you're not activating your grants, this [INAUDIBLE] out there. And that looks bad on you guys. So it actually is helpful for us.

ALEX MEDLER: That's good to hear. That's an interesting point because we have been in the Budget tab-- and I might ask you to submit written comments on this one-- we were trying to deal with, well, should we deal with the award or the drawdown in the visualization? And we didn't want to have SEAs-- well, in our internal discussion as we were thinking through all the data, one of the thoughts was, well, if we do the awards, at least we know we've made them.

If we do draw down rates, then there may be school-level challenges that then make it look like the SEA hasn't given the money and people like, well, why didn't you give the money away? When in fact, they made the award and the school hasn't drawn it down. So we saw that we could have stakeholders who had an interest in showing it one or the other.

And so we-- eventually we can do the draw down as a function of either the schools-level data or in the aggregate on the Budget page. So your feedback on that question would be good.

YOLANDA: And how would that much work because every state is slightly different? And like for Florida, we have-- as the SEA, we give the funds to the LEA. And the LEA is the one who draws down for the school. So there's-- I don't know how that would reflect on the dashboard.

But I think definitely when we do our reporting and we report the amount that we have obligated and we're allocating per school, per project, and then we show their expenditures to date, that shows at least activity of the funds that they have been expending that we anticipate. It's a real time for the funds that we anticipate for them to actually-- because you estimate award here, but I think that when you open that up, the next column that gets collected is how much has actually been--

ALEX MEDLER: Drawn down.

YOLANDA: --release or something like that. So that makes a difference.

ALEX MEDLER: So one of the things we could do-- in earlier drafts we talked about it internally-- was like on the subgrantee map, or on subgrantee enrollment, or on the budget, we could do more about visualizing the extent to which schools have drawn down the money. So on the subgrantee map when you roll over the subgrant, we could include in that data list the amount that they've drawn down-- something like that.

So if you have a preference, please give us as concrete a suggestion as possible in your written comments-- really appreciate that. Yeah, because we-- we also know that this is where the WestEd data gets tricky because clearly states have different approaches. And it's reflected in how the data template is used that gets reported to WestEd.

OK, other questions or comments? This is exactly the type of feedback we were hoping to get. Thank you. Anything else, anybody?

YOLANDA: It looks user friendly, so it's just-- of course, mine's just more when the data is collected, which I think you answered and that will make sense of the most current data of the APR budget and WestEd. So I think that should work perfectly.

ALEX MEDLER: Yeah, it's certainly a streamlined way to do it. So the onus has been on not trying to add a

data burden to people, so there will be tradeoffs for sure as we do that. Any other questions or comments?

So let me just wrap up with our next steps and what we would like. As I said, we're hoping to solicit comments from people in the states by next Monday. You can direct those to me by email or to Sarah. If you have any questions or comments, you can reach us by email or phone.

If you have some technical questions, I might rope in our colleagues Leo and Rajit who've been doing a lot of the building of the visualization things here. But you can use my email as a portal, and I'll be the ombudsman if there's something tricky.

We'll consolidate all that feedback and information and what we've also seen through usability, and then share to the feds a set of proposed changes or amendments or topics or further discussion. Then we'll make those changes after we get some feedback from the department. And then they will put it into their approval or vetting process within the department. And then as soon as possible through that, the priority for the department is to make an outward looking version of this as soon as we can.

We are doing similar exercises, you should know, for the Charter Management Organization grants and for the Credit Enhancement Grants, which I think are quite interesting. We look forward to those coming out as well. And it's all part of the department's strategy to try to promote transparency about the program. In part, I think, it's just good government to let people know how the programs work.

And I also think as the charter school program has an opportunity to expand and people ask about it, the intention is to be transparent about what's going on, where the money is going, how it's being used, where it ends up in the field. So people really get a sense of the scale and the amount of activity going on, as people will, over the next few years, probably debate how to increase or expand the charter school program and all its different pieces. So this is an effort to be transparent, to make sure people understand it, and they understand the differences between states and grantees and stuff.

In terms of other direct outreach from us, you will receive a survey after this webinar. So if you want to respond to that, that would be greatly appreciated. We do all these webinars with the states and general webinars, and so we're always looking for feedback on how to conduct them and what works for you and what doesn't. So please take that seriously.

And other than that, I just want to say we really appreciate how helpful states have been and all the different partners involved in getting data this together. Does anybody else have any comments or questions before we close today? OK, well, thank you very much. Look forward to seeing your comments later. I think that wraps this up for today. Thank you very much.

SPEAKER: Thank you.