



The Charter School of  
**SAN DIEGO**

**2015 Malcolm Baldrige  
National Quality Award Application**  
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**The Charter School of San Diego**  
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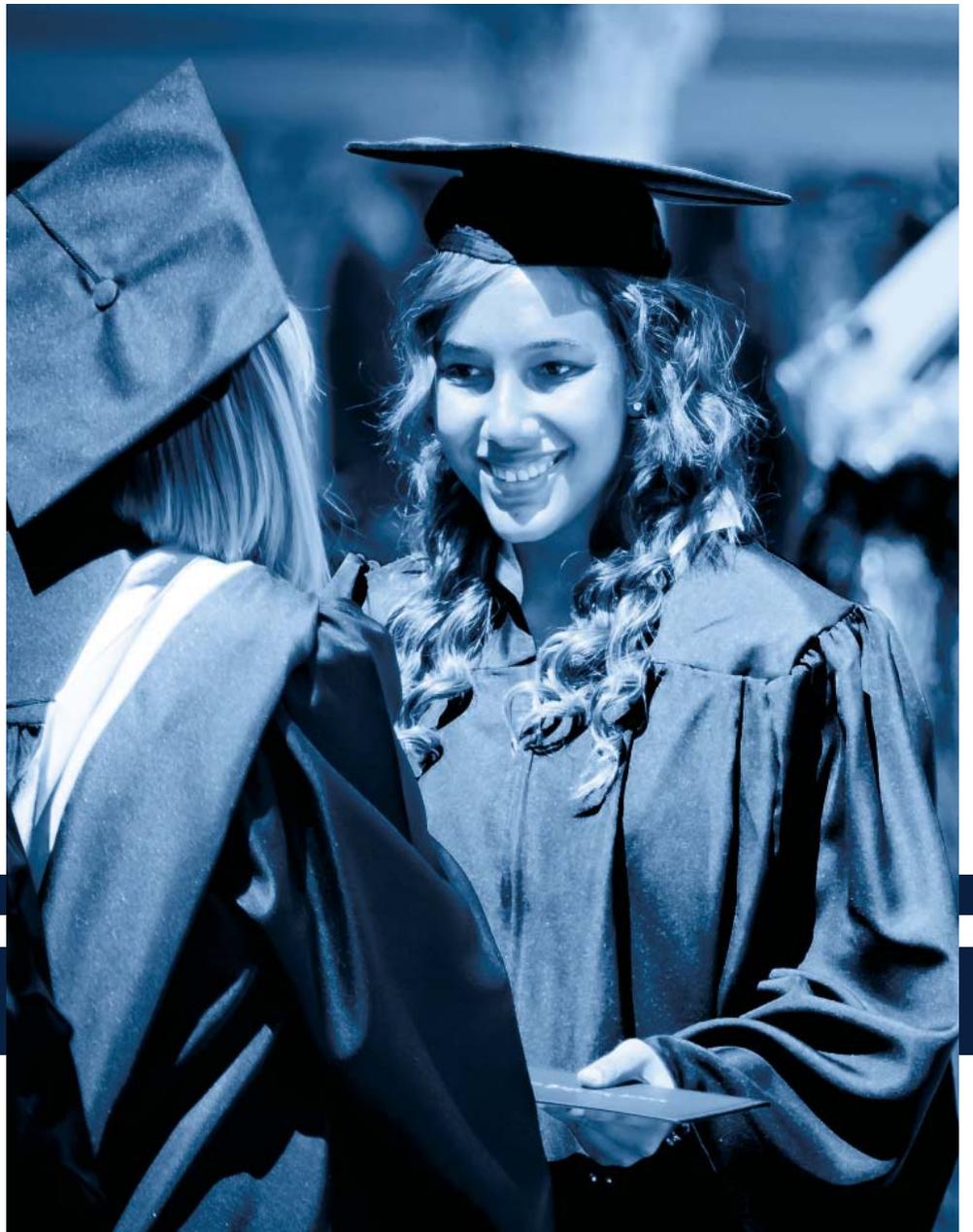
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# GLOSSARY OF TERMS & ABBREVIATIONS



## The Charter School of San Diego

### A

#### **ADA**

Average Daily Attendance - The California system for measuring daily attendance of students in K-12

#### **Altus University**

AU - a key component of the CKMS, AU is the main professional development structure for CSSD; Full AU offerings AOS

#### **AOS**

Available on site

#### **AP**

Action Plans

#### **ASAM**

Alternative Schools Accountability Model - California's ASAM system provides school-level accountability for alternative schools serving a highly mobile and at-risk student population; to qualify for ASAM status 70% of the school's total enrollment must include: expelled, wards of the court, pregnant and/or parenting, recovered drop-outs, and/or habitually truant students

#### **AU**

Altus University - a key component of the CKMS, AU is the main professional development structure for CSSD; Full AU offerings AOS

#### **Authorizer**

Charter law requires all charter schools to have a school district provide sponsorship and oversight to operate; CSSD's authorizer (sponsoring district) is **SDUSD**

### B

#### **BOD**

Board of Directors

### C

#### **CAHSEE**

California High School Exit Exam – Beginning with the class of 2006, California students must pass the test in order to receive a diploma; the two-day test covers math through algebra, English skills and writing

#### **CAC**

Community Advisory Committee (Special Education)

#### **CAG**

Charter Advisory Group - Select group of Charter leaders that advise the SDUSD Charter office in matters relating to charter schools

#### **CAASPP**

California Assessment of Student Performance and Progress

#### **CBEDS**

California Basic Education Data System - A common day on which all schools throughout the state take an official count of their students

#### **CC**

Core Competency - Transforming Lives

#### **Curriculum Council**

Each subject-area Curriculum Department Chair - Curriculum Lead, Curriculum and PD Coordinator, School Site Coordinator that oversees development and alignment of curriculum, course syllabi, materials, and selection textbooks; staff development and strategies to reinforce teaching strategies and deepen faculty content knowledge

#### **CCL**

Curriculum Council Leaders - Leads the curriculum council and drives the curriculum process, includes curriculum department chairs

#### **CBO**

Chief Business Officer; SL and LT member

#### **CDE**

California Department of Education

#### **CEO**

Chief Executive Officer; SL and LT member

#### **CELDT**

California English Language Development Test - state-mandated test to determine English language proficiency; schools are evaluated on their ability to reclassify students as proficient English speakers

#### **CEO Council**

Chief Executive Officer Council - A group of prominent San Diego based CEO's that meet bi-annually to give advice and insight into CSSD's business operational developments

#### **Charter Renewal**

The process of getting approval from a charter school's authorizer for continuation of operation for another five year term; CSSD is in its 5<sup>th</sup> charter term

All information is proprietary in nature.

## The Charter School of San Diego

### **CKMS**

Collaboration and Knowledge Management System - segmented by stakeholder; key to CSSD's culture of accountability, knowledge sharing, innovation, and continuous improvement (Figure 4.2-1)

### **COMMS**

Communications Specialist; LT member

### **CPA**

Certified Public Accountant

### **CPDC**

Curriculum and Professional Development Coordinator; LT member

### **CSC**

San Diego Charter School Collaborative - Local collaborative started by CSSD's CEO for best practices and advocacy for San Diego charter schools

### **CSSD**

The Charter School of San Diego

### **CST**

California Standards Tests - Standards-based statewide tests. Schools are judged on the percent of students who test on the proficient or advanced level and STAR testing

### **CTR**

Certificated Teacher Resource - A credentialed classroom assistant that assist students and teachers

## *D*

### **DAC**

Data and Assessment Coordinator; LT member

### **Departments**

LT and Support Staff as assigned to departments given their specific work area. Instructional workforce members are assigned to departments based on expertise or interest; teachers write curriculum, select textbooks, and do professional development for all workforce members

### **DII**

Director of Instruction and Innovation; SL and LT member

### **District**

San Diego Unified School District - CSSD's granting agency

### **DOJ**

Department of Justice

## *E*

### **Edjoin**

Web-based application database used by CSSD

### **ELA**

English Language Arts

### **ELAC**

English Learning Advisory Committee

### **EL**

English learner students are those students for whom there is a report of a primary language other than English on the state-approved Home Language Survey and who, on the basis of the state approved oral language (grades kindergarten through grade twelve) assessment procedures and literacy (grades three through twelve only), have been determined to lack the clearly defined English language skills of listening comprehension, speaking, reading, and writing necessary to succeed in the school's regular instructional programs

### **E-Rate**

Under the direction of the Federal Communications Commission (FCC) this program provides discounts to assist schools and libraries in the United States to obtain affordable telecommunications and Internet access

### **ESEA**

Elementary and Secondary Education Act (formerly known as **No Child Left Behind**) - Federal legislation that mandates state testing with improving scores for all students and significant subgroups and sanctions for schools that do not produce results

## *F*

### **FBC**

Fringe Benefits Consortium - Joint purchase of benefits made possible by joining together of school districts

### **Fitness Gram**

Physical Fitness exam - State mandated physical fitness test for grades 5, 7, 9

## *G*

### **GAAP**

General Accepted Accounting Principles - Accounting guidelines used by accountants

### **GATE**

Gifted and Talented Education

All information is proprietary in nature.

## The Charter School of San Diego

### Goals

Established by the LT; Goals support the Strategic Plan and have Action Plans and Measures

### Governance

CSSD Board of Directors

### GPA

Grade Point Average

### Great Schools

Website used nationally by parents to monitor potential schools their child may attend

*H*

### HQ

Highly Qualified

*I*

### IEP

Individualized Education Plan - specific plan for Special Education students

### IT

Information Technology

*L*

### LAN

Local Area Network

### LCAP

Local Control Accountability Plan

### LCFF

Local Control Funding and Formula - process state of California implements to fund public schools

### LEA

Local Educational Agency - CSSD is declared the LEA; this places accountability directly on CSSD to report financial, operational, and student data to the state

### Leadership Team (LT)

Founder, President and CEO; Chief Business Officer; Director of Instruction and Innovation; Operations and Human Resources Administrator; Data and Assessment Coordinator; Curriculum and Professional Development Coordinator; School Site Coordinator; Communications Specialist and Assistant to the President; Partnership and

Development Coordinator; Special Instructional Services Coordinator

### LEC

Leading Edge Certification - nationally, recognized online teacher certification. Guides teachers through rigorous and engaging curriculum based on the International Association for K-12 Online Learning (iNACOL) National Standards for Online Teaching. The certification gives assurance that LEC Teachers have the skills to effectively facilitate online courses, and have a solid understanding on enhancing the learning opportunities for students

### LMS

Leadership Management System (Figure 1.1-1)

### LT

Leadership Team - Founder, President and CEO; Chief Business Officer; Director of Instruction and Innovation; Operations and Human Resources Administrator; Data and Assessment Coordinator; Curriculum and Professional Development Coordinator; School Site Coordinator; Communications Specialist and Assistant to the President; Partnership and Development Coordinator; Special Instructional Services Coordinator

*M*

### MAP (also NWEA)

Northwest Evaluation Association (NWEA) Measures of Academic Progress - A local assessment tool for teachers to use for student math, language usage and reading

### MIP Fund

Software used by finance for accounting purposes

### MOU

Memorandum of Understanding

*N*

### Naviance

Naviance is a comprehensive college and career readiness solution for middle and high schools that helps align student strengths and interests to post-secondary goals, and improve student outcomes

### NCES

National Center for Education Statistic - source of benchmark data used by CSSD

### NCLB

No Child Left Behind - Federal Law also see ESEA

All information is proprietary in nature.

## The Charter School of San Diego

### NWEA

Northwest Evaluation Association (NWEA) Measures of Academic Progress (MAP) - A local assessment tool for teachers to use for student math, language usage and reading

## O

### OHRA

Operations and Human Resources Administrator; LT member

### OPMR

Organizational Performance Measure Review - CSSD's performance measurement system; scorecard system (Figure 4.1-1)

### OSHA

Office of Safety and Health Administration - Federal guidelines for health and safety

## P

### Participation

Completed work product of a student as assessed by the teacher and given a time value of 1 day of attendance (ADA)

### PD

Professional Development

### PDIS

Process Design and Improvement System (Figure 6.1-2)

### PDLA

Plan/Do/Learn/Act - The act of the cycle for learning and improvement

### Performance Measurement System

See OPMR - Organizational Performance Measure Review

### PPEP

Pathways Personalized Education Plan – Key Process (Figure 6.1-1)

### PPEP Storybook (Annual and Monthly)

Detailed results review focused on instructional outcomes as it relates to the PPEP process and student progress

### Project AWARE Grant

A competitive grant awarded to CSSD in support Mental Health; Advancing Wellness and Resilience in Education

## R

### RC

Resource Center

### RCA

Resource Center Associate - assists teacher and students in instructional responsibilities

### ROP

Regional Occupational Program - Vocational educational classes in fields where employment opportunities exist; the second of two ways to fulfill the graduation requirement for participating in the community

## S

### SA

Strategic Advantages

### San Diego Charter School Collaborative

SDCSC - Local collaborative started by CSSD's CEO for best practices and advocacy for San Diego charter schools

### SARC

School Accountability Report Card - Annual report card of each school required by the state for public posting

### SAT

Scholastic Aptitude Test

### SIS

Student Information System - School Pathways is the main database that stores, shares, and reports on all key student and school information; key compliance tool

### School Pathways

Student information system and key compliance tool

### SDCOE

San Diego County Office of Education

### SDCSC

San Diego Charter School Collaborative - Local collaborative started by CSSD's CEO for best practices and advocacy for San Diego charter schools

### SDUSD

San Diego Unified School District - CSSD's sponsoring/authorizing district

### SELPA (El Dorado SELPA)

Special Education Local Plan Area

### Senior Leaders

SL - Founder, President, and Chief Executive, Chief Business Officer, and the Director of Instruction and Innovation

All information is proprietary in nature.

## The Charter School of San Diego

### Senior Leader Communication Plan

SLCP - Communication Plan used by SL to work with all stakeholders (Figure 1.1-2)

### SHRM

Society of Human Resources Managers - professional membership

### SI

Strategic Initiatives - Instructional plan, Sustainability and Innovation, Educational Reform; CSSD's Strategic Objectives

### SIS

Student Information System - School Pathways is the main database that stores, shares, and reports on all key student and school information; key compliance tool

### SL

Senior Leaders - Founder, President, and Chief Executive; Chief Business Officer; and the Director of Instruction and Innovation

### SLCP

Senior Leader Communication Plan - Communication Plan used by SL to work with all stakeholders (Figure 1.1-2)

### SP

Strategic Plan

### SPIS

Special Instructional Services Division - Special Education, Health Services and Special Student Populations

### Sponsoring District

Charter law requires all charter schools to have a school district provide sponsorship and oversight to operate; CSSD's sponsoring district is **SDUSD**

### SPP

Strategic Planning Process - Annual Process for strategic planning (Figure 2.1-1)

### SSC

Student Services Center - the main hub for student intake and current student records and information

### State

The State of California

### Storybook

Monthly CSSD Student Accountability report

### Strategic Initiatives

SI - Instructional plan, Sustainability and Innovation, Educational Reform; CSSD's Strategic Objectives

## SWOT

Strengths, Weaknesses, Opportunities, and Threats

*T*

### TME

Traceability Made Easy - System for tracking instructional resources, materials, and other assets

*V*

### VAPA

Visual and Performing Arts

### VMV

Vision, Mission, and Values that all support CSSD's Core Competency: Transforming Lives

### VOC

Voice of the Customer

### VPSS

State approved Highly Qualified Teacher Training Process - Verification Process for Special Settings

### VTT

Veteran Teacher Training

*W*

### WAN

Wide Area Network

### WASC

Western Association of Schools and Colleges - an international accrediting agency for schools and colleges

### WLDS

Workforce Learning and Development System (Figure 5.1-1)

### Workforce

CSSD Employees segmented by: Instructional Staff, Support Staff, and Leadership (LT and SL)



# ORGANIZATIONAL PROFILE

## The Charter School of San Diego

Since 1994, The Charter School of San Diego (CSSD) has transformed the lives of nearly 35,000 academically underserved students in grades 7-12 throughout San Diego County. Over 90% are high school students. As the first charter school authorized in the county, CSSD is a public school option that offers an academic intervention program to re-engage students. The school dramatically reduces dropout rates – an issue critical to the nation’s future (*Figure 7.1-1-4*). CSSD currently serves more than 4,000 students annually.

State law requires an authorizer for all charter schools. San Diego Unified School District (SDUSD) authorizes CSSD. CSSD is one of the largest public schools in San Diego. It serves students at risk of dropping out of high school through a primarily redirective program, meaning students enroll to become grade-level proficient so that they can return to their traditional, comprehensive high school. As a result and on average, 20 percent of CSSD’s student population changes every 10 months.

Students may also choose to graduate from CSSD with a diploma fully accredited by the Western Association of Schools and Colleges (WASC) (*Figure 7.4-6*). WASC is the highest accrediting agency in California. On average 98 percent of CSSD students complete their post-high school Pathway Plan (i.e. university/college, military, or vocational). Due to CSSD’s success in helping students achieve their PPEP goal, the average length of student enrollment is only 16 months.

CSSD’s focus on sustainability and sound business practices allows the school to serve the students of San Diego for the long-term. CSSD was the first charter school granted in San Diego County and the 28th charter school granted in California. Currently 1,732 charters have been granted in California since 1993. Of the charters granted, 40% have failed, making CSSD the 17th oldest charter school in California and whose charter has been renewed four times (*Figure 7.4-5*). Of these 17 schools, CSSD is one of five independent study schools, which are schools that specialize in student-driven educational programs. CSSD is designated by the state as an Alternative Schools Accountability Model (ASAM) school. ASAM schools have at least 70 % of the school’s total enrollment comprised of high-risk groups such as: expelled, wards of the court, pregnant and/or parenting, recovered dropouts, and/or habitually truant.

### P.1 Organizational Description

#### P.1a Organizational Environment

**P.1a(1)** CSSD’s main Educational Program and Service blends online and independent study to deliver a highly personalized educational Pathway for each student. We engage our students by delivering our program and services through our Key Process – the Pathways Personalized Education Plan (PPEP). The PPEP is the mechanism used by CSSD to reduce dropout rates and redirect over 600 students to partner schools annually.

Upon enrollment, the PPEP is created by the student-centered PPEP team that includes the teacher, student, parents, counselor and support staff. It considers high school graduation requirements, the student’s short- and long-term goals, learning styles, previous work, current interests, academic achievement, skills development and standardized test scores. The PPEP is reviewed and updated by the student, parents, teacher, and relevant support staff on a regular basis throughout the student’s enrollment.

All information is proprietary in nature.

## Organizational Profile

At CSSD, Kids Come First. The students’ educational experience is guided by a Highly Qualified (HQ) staff in a safe, supportive environment. Unlike a traditional school setting where teachers’ rosters can reach 140 students, CSSD teachers’ rosters are typically 40 students. Students are scheduled for Resource Center (RC) time so that no more than a total of 25 students are in the location at any one time. Hands on, personalized support by teachers and support staff ensures individual attention and the ability to get to know the students, their families and factors that affect their lives.

Students study one or two courses at a time, and the target is to complete one course every three to four weeks. Students can progress at an individualized pace, receiving tutoring or enrichment as needed. Unlike in a traditional school or a

<b>Figure P-1 CSSD Vision, Mission and Values</b>	
<b>Core Competency</b>	
Transforming Lives	
<b>The Vision</b>	
The educational community known as The Charter School of San Diego - Student Success Programs is committed to the development of a personalized instructional program that demonstrates positive outcomes for each student.	
CSSD is dedicated to the creation of instructional, service, organizational, and governance models that can serve as prototypes for educational reform.	
CSSD is committed to collaborative efforts to improve the quality of life for students, their families, and the San Diego community at large.	
<b>The Mission</b>	
The Charter School of San Diego will implement personalized educational programs to facilitate student achievement. These educational programs will demonstrate that standards-based educational reform can provide a prototype for changing the way teachers teach and students learn in the future.	
<b>Basic Values</b>	
Kids Come First.	
Education at CSSD is personalized, individualized, and high quality.	
CSSD is made up of a community of highly professional people. These committed individuals are independent, self-motivated, high-energy people who speak for themselves. They work to create a positive, challenging environment that is centered on teaching and learning.	
CSSD is committed to the creation of educational reform models centered on how effective educational organizations run, how teachers teach, and students learn.	
CSSD employees are accountable for their work.	
People-centered teams focus on supporting quality teaching and learning. Performance is measured on a variety of indicators that include productivity, credit ratio, auditability, quality, performance, and commitment to the vision of CSSD.	
CSSD is committed to the improvement of the quality of life for students, their families, and the community at large.	
CSSD uses business principles in managing the school.	

seat-based charter school where attendance is measured on the number of hours a student is present at school, CSSD measures attendance by the completion of course work that successfully

demonstrates mastery of Common Core state standards (Figure 7.5-3). This focus on measuring student success is evidenced through the Vision Statement that CSSD is committed to the development of a personalized instructional program that demonstrates positive outcomes for each student.

**P.1a(2)** CSSD’s Core Competency (CC), *Transforming Lives*, directly relates to the Vision, Mission, and Values (VMV) and drives every aspect of the organization (Figure P-1). From the beginning, parents, students, teachers, administrators and community members envisioned an entirely new type of educational program that would meet the needs of students who were not succeeding in traditional schools and students who prefer an alternate method of completing high school.

This vision was influenced by research that showed high school is a time of great risk because schools are large, impersonal, and competitive. This supports the Vision for a “personalized instructional program that demonstrates positive outcomes for each student.” Founders were also influenced by research that indicates that many students failed to succeed academically because of group and societal issues. The Vision continues: “CSSD is committed to collaborative efforts to improve the quality of life for students, their families, and the San Diego community at large.”

CSSD teachers are committed to excellence in teaching. They are actively involved in the development of a curriculum that is rigorous, aligned to Common Core State Standards, and meets the individual needs of the students. They are also actively involved with students and their families. Teachers are engaged with parents almost weekly, meeting formally with parents several times a year, making home visits, making phone calls to discuss progress, and considering students’ families as a

part of the learning process.

**P.1a(3)** CSSD’s LT has more than 160 combined years of service to the organization.

There have been no recent changes in CSSD’s workforce composition (Figure P-2).

CSSD engages its workforce in achieving its VMV through four key drivers. (1) Employees are actively engaged in the Strategic Planning Process (SPP) and (2) Workforce members are recognized by and have two-way communication with Senior Leaders (SL). (3) Teachers and support staff are uniquely engaged because they have a voice and play a role in designing and developing all aspects of the instructional program through the Collaboration and Knowledge Management System (CKMS) (Figure 4.2-1). The first three drivers empower CSSD’s employees to create the PPEP, which is the key process to Transforming Lives.

Employment is “at will,” and both certificated and classified employees are contracted on an annual basis. Employees are not represented by any collective bargaining agreements. CSSD has been deemed the “exclusive public employer of the school’s employees” for the purposes of the Educational Employment Relations Act (Gov. Code sections 36-40). As the public school employer, the CSSD Board of Directors (BOD) and its managers assume full responsibility for establishing and implementing the terms of employment for CSSD.

**Figure P-2 Workforce Profile**

Instructional Staff: 149 Staff Members		
Employee Groups and Segments		Education Requirements Credential/NCLB HQ
General Education Teachers	68	100% met
Special Education Teachers	11	100% met
Part Time Resource Center Associates	56	100% met
Special Education Instructional Assistants	4	100% met
Certificated Support	10	100% met
Support Staff: 34 Staff Members		
Employee Groups and Segments		Education Requirements
Pathways Support Services	15	HS diploma or Bachelor's Degree (BA), Professional Services Job Assessment
Business Services	15	
Lunch Drivers	2	
Health and Instructional Clerk	2	
Leadership: 12 Staff Members		
Employee Groups and Segments		Education Requirements Credential and BA
Certificated	9	100% Credentialed
Classified	3	100% BA

**Figure P-3 Special Health and Safety Trainings**

Training	State/Federal Requirement	CSSD Requirement
Blood-borne Pathogens	Annual	Annual
Child Protective Services	Annual	Annual
Sexual Harassment	Every 2 years	Annual
Staff/Student Interaction	N/A	Annual
Safety	N/A	Quarterly
Earthquake and Evacuation Drills	Annually	Semiannually

To ensure that the organization is a safe and supportive working and learning environment, 100 percent of CSSD employees are required to maintain clear finger print reports from the Department of Justice and Tuberculosis Test results. In addition, each employee annually signs a Code of Ethics and a Staff-Student Interaction policy outlining ethical conduct. Figure P-3 outlines CSSD’s Special Health and Safety Training requirements. Threat Assessment, CPR, Cyber Bullying and Technology Security, and Mental Health Support are all trainings the school requires by position, as appropriate. These trainings are all above and beyond state and federal mandates.

**P.1a(4)** CSSD facilities are safe, secure, and conducive to learning. They are comprised of 18 resource centers, two Student Support Regional Centers and one Corporate Office. The total area for these facilities is 79,625 sqft. These locations house administrative personnel, Student Services Centers (SSC), library/textbook offices, special education offices, the health office, instructional and assessment services, and resource centers. CSSD resource centers are uniform in instructional materials, technology and design to ensure a consistent learning environment among the sites. Offices and resource centers are

## The Charter School of San Diego

located in free or reduced-price space, commercial office space, neighborhood storefronts, shopping centers, shopping malls and community-shared buildings. Due to many successful partnerships, CSSD saves \$517,456 of taxpayer dollars annually.

This annual savings is one of many examples of CSSD's dedicated and aggressive approach of overseeing fiscal operations and budgeting processes (*Figure 7.5-1-2*). This commitment enables CSSD to consistently maintain positive cash flow and annual increases to fund balances, which results in the ability to invest in student's learning. An example is CSSD's dedication to innovation and technology for all students. Over the last two fiscal years, CSSD has been able to invest \$1.2 million in technology and infrastructure. Of the 18 CSSD resource centers, 100 percent offer high speed internet access, wifi, a 1:1 student- and teacher-to-computer ratio, iPads and professional-level video conference capabilities. CSSD has also designed an InTech system at each resource center that offers a 70" TV display, Apple TV, and Barco's ClickShare (screen sharing technology).

*Technology for Higher Education* and Barco chose CSSD as a national case study because of its innovative integration of technology in education. Technology is integrated into every course and subject area offered to provide students with real world, practical technology training and experiences.

**Figure P-4 Legal and Regulatory Environments**

Regulatory Requirement	Regulatory Agency
Occupational Health and Safety Regulations	Cal-OSHA, Local Fire Authority, Federal and State Departments of Labor
Accreditation	WASC
Certification	NCAA, University of California (UC) Regents, Department of Justice
Registration requirements	California Department of Education (CDE); San Diego Unified School District (SDUSD)
Education Industry Standards	Federal and State Departments of Education (NCLB), CDE (SB 740); SDUSD, California Commission on Teacher Credentialing
Environmental Regulations	Educational Code for Environmental Standards, Local City Planning Departments
Financial Regulations	IRS, Federal Accounting Standards Board, CDE, State Pension Program
Educational Program and Services Regulations	CDE (Independent Study Compliance)

**P.1a(5)** CSSD operates in a dynamic regulatory environment as seen in *Figure P-4*.

For the safety of students and staff, CSSD conforms to local fire regulations and OSHA and federal and state departments of labor regulations. CSSD has consistently earned a 6-year term by WASC, which is the longest term granted (*Figure 7.4-6*). CSSD courses are certified by NCAA and the University of California Regents. Additionally, all employees' fingerprints are certified by the Department of Justice prior to employment. The school's registration and industry standards requirements are set by the federal and state departments of education, SBE

All information is proprietary in nature.

## Organizational Profile

and its local authorizer SDUSD. CSSD complies with federal regulations, such as No Child Left Behind (NCLB), and aligns curriculum to Common Core State Standards. Environmental regulations are determined by California Education Code and the city planning departments where CSSD resource centers are located.

CSSD adheres to the rules and regulations prescribed by other government agencies, including Internal Revenue Service, Franchise Tax Board, California State Teachers Retirement System, California Commission on Teacher Credentialing, California Public Employees Retirement System and others. On an annual basis, an independent financial and operational audit is conducted by a Certified Public Accountant selected from a directory deemed by the state controller as qualified to conduct audits of the school (*Figure 7.5-5*). Although not mandated, CSSD chooses to proactively audit every student record.

Since 1994, CSSD has been regulated by the Charter Schools Act of 1992 that was designed to reform education. It allowed approved charter schools to operate free of most of the California Education Code. In succeeding years, the Legislature has passed extensive legislation that affects charter schools, especially those who use independent study approaches. In 2001, the Charter Schools Act (SB 740) established criteria for the funding of independent study charter schools. In 2003, charter schools were required to comply with regulations that greatly increased the authority of each County Superintendent of Schools and the State Superintendent of Public Instruction (*Figure 7.5-4*).

### P.1b Organizational Relationships

**P.1b(1)** CSSD was originally approved as a charter school by SDUSD in 1993 and by the California Department of Education in 1994. In March 2003, CSSD became a California Nonprofit 501(c)3 Public Benefit Corporation. The operational management of CSSD is the responsibility of the corporation within the terms and conditions of its charter petition.

In 2006, CSSD, under the official name Student Success Programs, Inc., became a subsidiary of Altus Institute, Inc. Altus Institute was established to streamline efforts to establish a Charter Network that will replicate CSSD in other geographic locations. CSSD functions as a separate entity and has its own judicial personality. It provides 100 percent of its services directly to customers, independent of the parent corporation. Funding and resources are derived directly from State and Federal agencies and are directly controlled by CSSD.

CSSD is governed by a BOD, whose composition is defined in the CSSD Charter and Corporation Bylaws. The Chief Executive Officer (CEO) of CSSD is directly and solely accountable to the CSSD BOD. The President and CEO is responsible for the short- and long-term initiatives, growth and strategic plans of CSSD. The CEO, the Chief Business Officer (CBO) and the Director of Instruction and Innovation (DII) make up the SL Team. Joining them are additional members of the Leadership Team (LT).

**P.1b(2)** CSSD's key market segment is students in grades 7-12 in San Diego County. Key customers include students and their parents. Key customer requirements are listed in *Figure P-5*. Student data is segmented by grade-level, length of enrollment, ethnicity, teacher/ resource center /region, and special student

**Figure P-5 Key Stakeholders, Requirements & Results**

Key Customers	Key Requirements and Expectations	Alignment and Integration
Students	To achieve their educational goals as created through the PPEP (Figures 7.1-1-30)	The key customer requirements are reviewed annually as a key step of the SPP. The data (student and parent surveys, PPEP feedback) results, trends, and feedback from the prior year are analyzed and become an input into the Strategic Plan. The same data drives our PPEP and other organizational processes.
	To learn in a safe and supportive environment (Figures 7.2-1-2)	
	To be work place/college ready (Figures 7.1-1-30)	
Parents	For my child to learn in a safe and supportive environment (Figures 7.2-3-4)	
	For my child to become academically motivated and self-disciplined (Figures 7.1-10, 23-29)	
	For my child to graduate HS and have a plan for work force/college (Figure 7.1-22)	
Other Key SH	Key Requirements and Expectations	Alignment and Integration
Workforce	To work in a safe environment (Figure P-3)	The other key stakeholder requirements are reviewed annually as a key step of the SPP. The data and feedback from our stakeholders are analyzed and become an input into the Strategic Plan. The same data drives our instructional and operational processes.
	To have a meaningful professional development (Figures 7.3-10-12)	
	To be engaged in work (Figures 7.3-7-9)	
Governance (CSSD BOD)	To have a basic understanding of CSSD program design and Strategic Plan (Figure P-1)	
	Timeliness of development of the budget and fiscal stewardship (Figures 7.5-1-6)	
	Maintain compliance of policies and procedures (Figure P-4)	
Community	To decrease dropout rates (Figures 7.1-1-4)	
	To be fiscally responsible with taxpayer dollars (Figures 7.4-8, 7.5-2)	
	To have a safe environment	
Suppliers, Business Partners, and Collaborators	To have a basic understanding of CSSD program design (Figure P-1)	
	To have a basic expectation of CSSD's strong financial/business processes (Figure 7.5-2)	
Partner Schools	To be assured an option where students achieve educational goals and move forward (Figures 7.1-1-29)	
	To be assured of timely communications	
	To have: WASC Accreditation (Figure 7.4-6), UC a-g course alignment (Figure 7.1-35), NCAA approval	

populations. Based on survey data, PPEP feedback and the SPP, key requirements are consistent across all student segments. Individual and key requirements are addressed and outlined through the PPEP.

**P.1b(3) Suppliers, partners and collaborators play a significant**

All information is proprietary in nature.

role in CSSD's ability to remain innovative and to best serve its students. Key partners, suppliers, collaborators, their roles in CSSD's work systems, and their roles in enhancing CSSD's competitiveness and innovation are shown in Figure P-6.

Appropriate LT members regularly meet with suppliers, partners and collaborators to maintain effective two-way

**Figure P-6 Key Suppliers, Partners, Collaborators**

Suppliers/Partners/ Collaborators	Role in Work Systems	Role in Enhancing Competitiveness and Innovation
Suppliers	Southland Technology Incorporated (IT Provider)	Share best practices across industries to remain a leader and national role model in education
	School Pathways (Student Information System and Teacher Effectiveness Tool)	
	Edgenuity (Online Curriculum Provider)	
Partners	JPA/FBC (Benefits and Risk Management)	Identifies and provides students who would benefit from our program and services
	Partner Schools (Feeder Schools)	
Collaborators	El Dorado SELPA (Special Education Services)	Advise and collaborate to optimize strategic planning and internal processes to maintain a strong level of agility, innovation, and competitiveness
	NICE GUYS (Community philanthropist)	
	CEO Council (Advisory board made up of local business leaders)	
	Charter Advisory Group (District-level charter collaborative)	
	Charter Membership Organizations	

communication. Communication occurs during in-person meetings, phone conferences and via email. CSSD's supply chain requirements include contracting with companies in good financial standing and those who can help CSSD move forward in innovative and cost effective ways.

**P.2 Organizational Situation**

**P.2a Competitive Environment**

**P.2a(1)** The competitive position of CSSD is the first and largest independent study charter school in San Diego County. Today, regardless of increasing competition, CSSD remains the largest in the county and one of the largest in California. CSSD serves more than 4,000 students per year despite the documented failure of 40% of other charter schools across the state. The school is also ranked as one of the highest performing ASAM schools. Currently, there are three competitor ASAM schools with similar instructional design and student demographics within the market. CSSD is growing its market share in the face of increased competition (*Figure 7.5-6*).

**P.2a(2)** CSSD is committed to tracking key changes in the educational landscape at a national, state and local level. Key changes that are currently affecting CSSD’s competitive situation are an increase in educational options, the role of technology in education, and competition for HQ teachers.

The CSSD BOD charged the CEO with the task of collecting knowledge based on research to address the question of what decisions should the organization make now to best position students, staff and the school for the future. The Nationwide Educational Reform Tour fulfills this BOD directive. The CSSD CEO and the Educational Reform Project Director have traveled nationally to 18 states and 41 cities to interview legislators, administrators, practitioners and key decision makers. The objective is to identify national trends, best practices and challenges. This information is synthesized and interpreted to positively impact CSSD’s customers and stakeholders, as well as the local and state educational landscape. CSSD SL have embraced this unique opportunity for innovation, collaboration, and intelligent risk-taking. CSSD has rolled out cutting-edge technology, online curriculum and Altus University’s intense professional development program as a result of Educational Reform Tour findings. The San Diego Charter School Collaborative, an Altus-developed membership organization comprised of SDUSD charter leaders, was also formed to share best practices. To our knowledge there is no other charter school leader in the country with such a commitment to learning through benchmarking both successful

and unsuccessful educational reform initiatives.

**P.2a(3)** CSSD’s key sources of comparative and competitive data within the education sector are the California Department of Education, state and national charter school associations, consultants, research studies, Educational Reform project findings, and state and national education Baldrige recipients. Key sources outside of the education sector include state and national Baldrige recipients, Hay Group, financial and human resources databases and associations, and the CSSD CEO Advisory Council.

Because, by design, CSSD redirects or graduates the majority of its student population every 16 months, traditional academic measures do not give an accurate picture of student learning and progress. Comparing similar data points with traditional schools is not a valid comparison. Many competitors do not collect similar in-depth data to alternatively measure student progress and success, so benchmarking opportunities are challenging.

**P.2b Strategic Context:** See *Figure P-7*

**P.2c Performance Improvement System**

CSSD’s business model has benefitted from a 10 year commitment to the Baldrige Criteria and processes for continuous innovation and improvement. The performance improvement system begins with CSSD’s Strategic Planning Process during which Strategic Initiatives (SI) are set. Each SI contains Goals, Action Plans and measures for each department. The performance measures cascade to the individual within CSSD. The LT uses the Organizational Performance Measure Review (OPMR) to review these measures on a monthly basis along with other environmental factors that could impact CSSD. If performance does not meet expected targets, a collaborative plan is created to correct the direction. If a process needs to be designed or improved to ensure alignment with SI and targets, CSSD uses its Process Design and Improvement System, which is based on the Plan, Do, Learn, Act (PDLA) model. Continuous improvement is sustained and achieved through the Leadership Team’s regular analysis of the effectiveness, the level of innovation, and integration of its processes.

*Figure P-7 Strategic Context*

Area	Key Strategic Challenges	Strategic Plan Integration
Educational Programs & Services	Improving student learning, especially for an at-risk student population	CSSD Instructional Plan
Operations	Increase in competition from other charter schools and school districts	CSSD Sustainability Plan
Societal Responsibilities	Proactively responding to the politically charged educational environment	CSSD Educational Reform Plan
Workforce	Finding and engaging highly qualified faculty and staff committed to the school mission and its target population	CSSD Instructional Plan
Area	Key Strategic Advantages	Strategic Plan Integration
Educational Programs & Services	A dynamic educational program driven by an engaging staff and a rigorous curriculum supported by state-of-the-art technology and high quality instructional materials	CSSD Instructional Plan
Operations	First and largest charter school in San Diego County with a storied history and a strong reputation	CSSD Sustainability Plan
Societal Responsibilities	A strong leadership team with a bold spirit centered on innovation and change with a focus on excellence	CSSD Sustainability Plan
Workforce	A strong philosophy of providing exceptional staff training, higher compensation, and career advancement opportunities to attract and retain highly qualified staff	CSSD Instructional Plan



# **RESPONSES ADDRESSING ALL CRITERIA ITEMS**

# 1 LEADERSHIP



## CATEGORY 1: Leadership

### 1.1 Senior Leadership

#### 1.1a Vision, Values, and Mission

**1.1a(1)** CSSD's Senior Leaders (SL) are led by the Founder, President, and Chief Executive Officer (CEO); the Chief Business Officer (CBO), and the Director of Instruction and Innovation (DII). As active members of CSSD's Leadership Team (LT), the SL use a systematic approach named the Leadership Management System (LMS) as seen in *Figure 1.1-1* to guide CSSD and its instructional program, the PPEP, and supporting departments.

The Mission, Vision and Values and the Core Competency of Transforming Lives are revisited annually as part of *Step 2* of the SPP to ensure continued integration of stakeholder requirements and expectations. SL fully deploy the Vision, Mission and Values (VMV) into daily work using the LMS. Communication of the VMV to all key stakeholders is accomplished through various communication vehicles as seen in the SL Communication Plan (*Figure 1.1-2*). Some examples per stakeholder group are:

*Students and Parents* - The VMV are initially presented to students and parents during an intake orientation. They are reinforced through the relationship among student, parent and teacher during their enrollment at CSSD as well as through the communication methods shown in *Figure 1.1-2*.

- *Workforce* - New workforce members are introduced to the VMV during the interview process, and throughout their first five days they receive personalized training on the VMV of the organization. Throughout the year, SL communicate to the workforce through the SL Communication Plan (*Figure 1.1-2*) and recognize employees who demonstrate exceptional dedication to the VMV. Additionally, the focus on the key process, PPEP, and it's alignment to the VMV/CC help keep all workforce members engaged daily.

- *Governance (CSSD BOD)* - The VMV are introduced to the BOD during the initial selection process. Formal training occurs upon initiation.

- *Community* - The VMV are deployed to the community through the school website, organizational publications, and community events.

- *Suppliers, Partners and Collaborators* - CSSD shares its VMV with Suppliers, Partners and Collaborators during initial selection, contracting or the development of the Memorandum of Understanding (MOU). The VMV are reinforced during standard business interactions and annual contract review.

- *Partner Schools* - CSSD and its partner schools maintain a current MOU that outlines the VMV of both CSSD and the partner schools. The VMV are deployed through the school website, organizational publications, and community events. Bi-annual counselor meetings with partner schools also provide a face to face opportunity to discuss CSSD's VMV/CC.

As shown in *Figure 1.1-1*, SL use the VMV to guide them as they develop and implement the SPP and as they provide support, sustain the organization and continually improve and innovate.

SL reflect a commitment to the VMV by serving as role models through their personal actions. The CEO, Mary Searcy Bixby, conducts "Mary's Musings" quarterly during faculty and staff meetings. "Mary's Musings" are heartfelt messages that

embody the values of the organization. Topics are selected based on timeliness and relevancy.

All SL constantly and consistently address the VMV during formal meetings, and all interactions with students, parents, faculty, staff and the community at large. They set the example for integrity, professionalism and accountability.

**1.1a(2)** SL set and model high standards for legal and ethical behavior at CSSD. CSSD does not distinguish among its workforce segments in regard to ethical behavior. All SL participate in ethics trainings alongside other members of the workforce and adhere to legal and ethical requirements.

Processes for promoting ethical and legal behavior are systematic, mature, and well deployed. To promote an organizational environment that requires a commitment to legal and ethical behavior, SL identified a process that begins during the interview process and continues throughout employment at CSSD. All employees are required to receive a low-risk grade on the Work Styles Behavior Survey and an initial clearance and real-time maintenance of clear criminal background check. Each employee receives an Employee Handbook upon hire that clearly outlines acceptable behavior for CSSD workforce members. They are also required to annually sign the organization's Standards of Conduct, Code of Ethics, Student-Staff Interaction Policy, and Non-Disclosure Agreement.

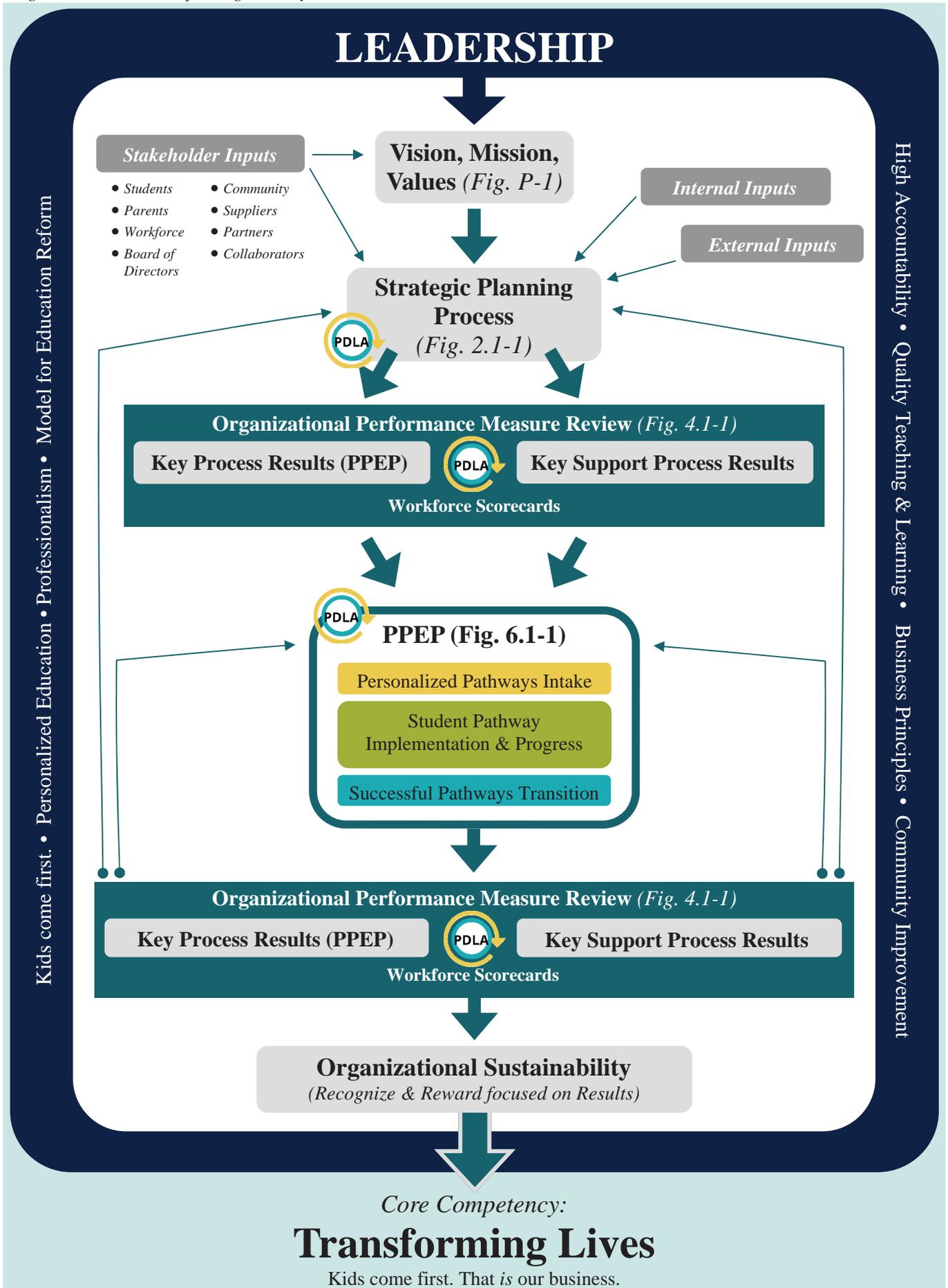
As models for students and parents, all employees are held to a high standard of professionalism through their dress, speech, and conduct.

**1.1a(3)** SL build an organization that is successful now and for the future through the LMS (*Figure 1.1-1*). The LMS begins with inputs from external and internal sources as well as stakeholder requirements. (*Figures 2.1-2 and P-5*). The balance of these inputs serve as a checkpoint on an annual basis for the consideration for the VMV. This is a key step as described in *Figure 2.1-1* of the SPP. The ultimate guiding focus is based on CSSD's Core Competency of Transforming Lives: the single filter by which all decisions are made supporting CSSD's most important value that Kids Come First. An integrated approach represented by the LMS assures long-term organizational sustainability. High performing results throughout Category 7 demonstrate the effectiveness of the integration of the LMS.

Through a disciplined PDLA approach at the organizational and individual level, CSSD creates an environment for achieving the Mission, improving performance and accomplishing organizational and individual learning. A full description of the SPP is outlined in *Figure 2.1-1*. An outcome of the SPP is the identification of scorecards for the organization, department, and each individual member of the workforce. PDLA is used as a tool to identify learning opportunities at all three levels. The constant focus on organizational improvement combined with this systematic alignment of scorecards creates an environment that enables CSSD to achieve its Mission.

SL create a workforce culture that delivers a positive experience for students and parents by creating a culture that enables teachers to live their dream of being able to focus on the individual student. Low student-to-teacher ratios and hands-on, personalized support by teachers ensures individual attention

Figure 1.1-1 Leadership Management System



Kids come first. • Personalized Education • Professionalism • Model for Education Reform

High Accountability • Quality Teaching &amp; Learning • Business Principles • Community Improvement

and the ability to get to know the students, their families and factors that affect their lives.

Innovation and intelligent risk taking represent the founding principles of CSSD. CSSD was the first charter school in San Diego County and chose to focus on students who are at-risk of dropping out of high school. Today, CSSD’s CEO has traveled nationally to 18 states and 41 cities as part of the Nationwide Educational Reform Tour to identify national trends, best practices, innovation and challenges. Lessons learned influence SI and influence decision making. Leadership encourages risk taking and innovation at all levels of the organization (*Figure 7.4-12*).

SL participate in succession planning and the development of future organizational leaders with the establishment of a formal succession planning process, most recently revised in 2012. The succession planning includes factors for selecting candidates, a process for developing leaders, and the selection for successors. It also includes a confidential letter that has been prepared by the CEO and legal counsel in the event the CEO must be replaced unexpectedly.

**1.1b Communication and Organizational Performance**

**1.1b(1)** SL communicate with and engage the entire workforce, students, and other key customers through the SL Communication Plan. The SL Communication Plan includes all mediums, including social media, and indicates methods used to accomplish two-way communication (*Figure 1.1-2*).

Key decisions are primarily communicated through in-person conversations, email, phone, and meetings.

SL are directly involved in motivating the workforce by frequent communication that is largely focused on the high performance of the organization. Further, SL recognize employees who demonstrate alignment with the VMV/CC throughout the year. (See recognition as described in 5.2a(4)).

**1.1b(2)** SL create a focus on action that will achieve the organization’s VMV/CC through the LMS. The LMS integrates a strong focus on the organization’s performance through the SPP and the Organizational Performance Measure Review (OPMR) (*Figure 4.1-1*). The SPP and OPMR provide the capability to sustain the key process of the PPEP and CSSD’s support processes. Innovation is deeply embedded within all of CSSD as evidenced throughout this application beginning with the very basics of CSSD’s original Charter to ongoing efforts such as the Nationwide Educational Reform Tour as referenced throughout the application. Results stemming from key support processes indicate the ability for CSSD to achieve organizational sustainability to support the ultimate CC to Transform Lives.

SL are agile in identifying needed action through the development of the SPP that is comprised of high level initiatives with supporting goals and AP deployed through an integrated scorecard system that is evident at organizational, department and individual workforce member levels. Stakeholder considerations are evident in Step 1 of the SPP as seen in *Figure 2.1-1*.

**Figure 1.1-2 Senior Leader Communication Plan**

Medium	Stakeholders							Purpose				
	Students	Parents	Workforce	BOD	Community	Supp. Part, Collab	Partner Schools	Frank, 2 Way	Key Decisions/Needs	Motivation	Rewards/Recognition	Engagement
Communicate VMV	A	A	Q, A	Q	O	Q, A	Q		X	X	X	X
Welcome Aboard Cards			O	O						X	X	X
Birthday Cards			A	A						X	X	X
Thank You Notes	N	N	N	N	N	N	N			X	X	X
Email	N	N	D	W	N	N	N	X	X	X	X	X
President's Award			A							X	X	X
Wave Rider Recognitions			A, N							X	X	X
Faculty Meetings			Q					X	X	X	X	X
One-on-One Discussions	N	N	N	N	N	N	N	X	X	X	X	X
Website	Q	Q	Q	Q	Q	Q	Q		X	X	X	X
Radio	M	M			M				X	X	X	X
Social Media	D	D	D	D	D	D	D		X	X	X	X
BOD Minutes	Q	Q	Q	Q	Q	Q	Q		X			
LT SPP Retreat			A	A				X	X	X		X
AU: Executive Studies			Q					X	X	X	X	X
AU: New Employee Training			O					X	X	X	X	X
AU: Executive Safety Committee			Q					X	X	X		X
End of the Year Luncheon			A	A						X	X	X
VMV Video			O		N	N			X	X		X
Graduation	A	A	A	A	A	A	A			X	X	X
Satisfaction Survey	A	A	A					X	X	X		X
OPMR			W, Q	Q	N	N	N	X	X	X	X	X
Charter Collaborative					Q, N			X	X			X
PPEP Storybook	M	M	M	Q	N			X	X	X	X	X
Leadership Meetings			Q					X	X	X	X	X
Strategic Sustainability Meetings			M					X	X	X		X
Alert Now	N	N	N						X	X		X
ELAC		Q	Q					X	X	X		X
Open House	A	A	A	A	A	A	A	X	X	X	X	X
Senior Nights	A	A	A	A	A	A	A	X	X	X	X	X
Resouce Center Visits	Q		Q					X	X	X	X	X
Office Meetings			Q					X	X	X	X	X
Culture Events: Office Celebrations			N							X	X	X
Student and Parent Resource Guide	O	O	O	O	O	O	O		X	X		X

*Frequency: A=annually, Q=quarterly, M=monthly, W=weekly, D=daily, O=ongoing N=as needed*

**1.2 Governance and Societal Responsibilities**

**1.2a Organizational Governance**

**1.2a(1)** CSSD’s governance model is unique to public education (Figure 1.2-1). As a charter school governing board, the CSSD BOD assumes full responsibility for policy formation, accountability for SL actions, and SP outcomes. The CSSD BOD and SL are accountable to the SDUSD BOD for the school’s instructional outcomes and fiscal viability. External auditors perform reviews on both the financial and operational areas of the school.

**Figure 1.2-1 Ensuring Responsible Governance**

Key Aspects	CSSD BOD	SDUSD BOD	External Auditors
Accountability for SL Actions	X	X	X
Accountability for Strategic Plans	X		
Fiscal Accountability	X	X	X
Transparency in Operations	X	X	X
Selection of Governance Board Members	X		
Governance Board Member Disclosure Policies	X	X	
Independence and Effectiveness of Internal and External Audits	X		X
Protection of Stakeholder Interests	X	X	X
Succession Planning for SL	X		

The CSSD BOD represents the interests of all stakeholders for oversight of financial viability and organizational sustainability. The BOD includes the President of the Board, a corporate attorney, a former School District Superintendent, a community representative, a parent representative, two teacher representatives and a retired Navy Rear Admiral representing the community at large. Members serve two-year terms. After this period, the member must remain off the BOD for at least one year. The selection of new board members is fully vetted through current members to ensure their commitment to and alignment to CSSD’s CC and VMV. Each member is selected because of the specific frame of reference he/she brings to the BOD. The BOD has a well-established conflict of interest policy that is reviewed annually. Members of the BOD and SL, in compliance with the California Political Reform Act, submit individual conflict of interest statements outlining any personal financial interests (Form 700) that could relate to the school. BOD meetings are held quarterly. An agenda is developed and distributed, action items are noted, votes are recorded and minutes are taken, reviewed and approved. As an active, vibrant BOD, members are available on an individual basis for advice between regularly scheduled meetings. The BOD follows the formal succession planning process that is outlined in 1.1a(3).

**1.2a(2)** At the highest level, the performance of the BOD and SL is monitored by CSSD’s authorizer, SDUSD. This creates an opportunity for an external evaluation. SDUSD holds the CSSD BOD and SL accountable for the successful, ongoing implementation of and adherence to the charter document. Within the term of the five-year charter renewal, CSSD must

meet all student performance and operational goals listed in the charter. SDUSD monitors performance through its Annual Oversight Audit (Figure 7.4-4). SDUSD uses this information to help determine whether or not to renew CSSD’s charter (Figure 7.4-5).

Internally, there are three levels for SL performance evaluations. Every other year, the BOD members undergo individual evaluations. The President of the Board is responsible for facilitating the evaluation. The process of the evaluation includes a self evaluation form and approval by the board as a whole. The BOD evaluates the CEO. The CBO and DII are evaluated by the CEO through scorecard results that directly tie to SI achievement. All evaluations serve as inputs into the SPP.

Performance evaluations do not determine executive compensation. Executive compensation is determined through the Salary Compensation Council and approved by the BOD. The Council is authorized by the BOD every five years. Benchmark data, cost of living differentials and levels of responsibility are key determinations for executive compensation.

SL develop and improve their effectiveness as leaders, the effectiveness of the BOD and the integration of the LMS through evaluation feedback and specific professional development activities. For example, BOD directed the CEO to research national educational trends to identify benchmarks, best practices, opportunities for innovation, and potential threats. The Nationwide Educational Reform Tour resulted from this BOD directive. Additionally, the CEO, CBO and DII are members and participants on various city, county and state professional boards, committees, and mentoring programs (list AOS).

**1.2b Legal and Ethical Behavior**

**1.2b(1)** CSSD anticipates and addresses public concerns with the educational programs and services and operations through the SPP inputs, specifically Voice of the Customer (VOC) data and the SWOT analysis. Key considerations of the SWOT includes external and internal compliance evaluations and stakeholder requirements as compared to corresponding results.

SL anticipate public concerns with future programs and services and operations as well as prepare for impacts and concerns through monitored learning of the Nationwide Educational Reform Tour, participation in the legislative development process, and professional representation on diverse community and professional boards and organizations at the local, state, and federal levels.

Knowledge gained from these activities are inputs into the SPP, which prepares CSSD for impacts and concerns in a proactive manner.

In an effort to conserve natural resources and effectively manage CSSD’s supply chain, SL give careful consideration to the placement of resource centers and office locations. First, student demographics and community and competitor data are gathered, analyzed, and used to determine where there is a community need. Next, SL insist on selecting environments that are safe and conducive to learning. Traffic patterns and transportation routes are considered. Intense negotiations with leasing agents ensure a compatible fit with other tenants. Locations receive appropriate city permits before operations begin.

Key compliance processes, measures, and goals for meeting and surpassing regulatory, legal, and accreditation requirements are outlined and addressed in *Figure 1.2-2*. Through the annual SWOT analysis, risks associated with CSSD’s educational program and services and operations are identified. The key processes in measuring and setting goals to address these risks are the SPP and the development of LT members’ scorecards.

**1.2b(2)** CSSD creates and maintains processes that promote and ensure ethical behavior in all interactions. These processes are used to deploy ethical behavior standards to all stakeholders.

CSSD retains legal counsel, and the BOD serves as a check and balance to ensure legal compliance. At least twice a year, an external auditor interviews BOD members and randomly selected workforce members, and reviews school-wide operational, legal, and financial compliance.

All workforce members set and model high standards for legal and ethical behavior. Every workforce member receives an Employee Manual upon hire. Members annually sign and are trained on CSSD’s Code of Ethics and Student-Staff Interaction Policy. These documents and trainings clearly define acceptable behavior at CSSD. During the interview process all applicants take a Work Styles Behavior Survey that measures their propensities for dishonesty or unethical behavior. Only those in the low-risk category are considered for employment. The Annual Ethics Survey is administered to all workforce members to measure ethical standards demonstrated by the LT, school processes, and other stakeholders. Ethics Survey results have traditionally been very favorable and serve as key inputs into the SPP. The results are reviewed by workforce segment to ensure all groups are in alignment with the ethical standards of CSSD.

Students and parents are made aware of CSSD’s ethical standards and requirements upon enrollment. Students and parents sign a Master Agreement, Acknowledgement of Responsibility, Technology Student Use Contract, Expectations for Student Behavior, Zero Tolerance Policy, and Loitering Law forms upon enrollment. Each form is reviewed and re-signed annually. Ethical standards are also outlined in the Student/Parent Resource Guide and the school website.

Ethical standards are deployed to other stakeholders through non-disclosure agreements, contracting, meetings and conflict of interest forms. To promote ethical behavior for suppliers, CSSD has a fully deployed and integrated procurement system with checks and balances.

Measures to assess the effectiveness of the process to promote and ensure ethical behavior are reflected in *Figure 1.2-3*.

CSSD is able to monitor and respond to all breaches of ethical behavior reported through the survey of all stakeholders annually and through the Complaint Process (*Figure 3.2-1*).

**1.2c Societal Responsibilities**

**1.2c(1)** CSSD considers societal well-being as part of its strategy and daily operations to support its VMV and CC to transform the lives of its students and their communities. Since CSSD functions primarily as an intervention for students at risk of dropping out of school, programs enable at risk students to become better citizens and societal contributors. CSSD students go on to the military, community colleges, four year universities,

**Figure 1.2-2 Process, Measures, and Goals for Achieving Compliance**

	Key Compliance Process	Risk	Measures	Goals/Results
External	WASC	X	Accreditation Term	Fig. 7.4-6
	SB 740	X	Funding Percentage	Fig. 7.5-4
	Local Control Accountability Plan	X	Student Achievement	Progress Report AOS
	NCLB/HQ		HQ Teacher Percentage	Fig. 7.3-2
	SDUSD Charter Renewal		Renewal Term	Fig. 7.4-5
	Annual SDUSD Oversight	X	Audit Results	Fig. 7.4-4
	Wilkinson, Hadley, & King Financial and Operational Audit	X	Audit Results	Fig. 7.5-5
	Department of Justice (Background Check)		Clearance	AOS
	I-9 Employment Eligibility		Clearance	AOS
	El Dorado Special Education Local Plan Area	X	IEP Compliance Percentage	AOS
Internal	Wilkinson, Hadley, & King Student Record Audit	X	Audit Results	Fig. 7.1-33
	Rigor, Compliance, and Quality Review	X	Compliance Rate	AOS
	Internal Controls	X	Audit Results	AOS
	Budget Process	X	Audit Results BOD Budget Approval	Fig. 7.5-5
	Attendance Processing Review	X	Audit Results	AOS
	Reserve Policy	X	BOD Budget Approval	AOS

and vocational schools as engaged individuals. CSSD turns potential dropouts into high school graduates, which statistically puts them at an advantage as they progress through life as societal contributors. Students with high school diplomas will commit fewer crimes, have a greater positive economic impact on their local communities, and in turn, their future children will have a greater likelihood of receiving a high school education. According to The Freidman Foundation for Educational Choice’s 2010 report titled “California’s High School Dropouts – Examining the Fiscal Consequences” approximately 19% of any current ninth grade class will drop out over a four year period. These dropouts will be more likely to be unemployed or out of the workforce and twice as likely to be living in poverty than students that do graduate. A high school dropout earns \$14,226 less per year than had they graduated high school. The lower

# STRATEGY

# 2



Figure 1.2-3 Key Ethical Processes

Stakeholder	Process	Frequency
Students and Parents	Master Agreement	Enrollment, Annually
	Acknowledgement of Responsibility	Enrollment, Annually
	Technology Student Use Contract	Enrollment, Annually
	Expectations for Student Behavior	Enrollment, Annually
	Zero Tolerance Policy	Enrollment, Annually
	Loitering Law	Enrollment, Annually
Workforce	Work Styles Behavior Survey Completed	At Interview
	Criminal Background Check by Department of Justice Completed	Before Hire, Ongoing
	Employee Handbook and Standards of Conduct Received and Signed	Hiring Process
	Signed Student-Staff Interaction Policy	Hiring Process, Annually
	Non-Disclosure Agreement	Hiring Process
	Signed Code of Ethics	Hiring Process, Annually
	Ethics Survey	Annually
	Auditor Interview with Staff Members	Annually
	Ethics Training	Annually, As Needed
	Comments@CSSD	As Needed
	External Audit of Records and Operations	Monthly, Quarterly, Annually
Governance (CSSD BOD)	Conflict of Interest Policy	Annually
	Personal Financial Interest Form 700	Annually
	Auditor Interview with BOD	Annually
Community	N/A	
Suppliers, Business Partners, and Collaborators	Non-Disclosure Agreement	Initial Contract, Annually
Partner Schools	MOU	As Needed

earnings of high school dropouts cost the state of California more than \$54 billion per year in lost taxable personal income.

All workforce members take pride in knowing that they are visibly contributing to the well-being and improvement of the greater San Diego community through the demonstrated education and personal successes of CSSD’s students. CSSD is fulfilling its societal responsibilities by making San Diego and California better one student at a time (Figure 7.4-8).

CSSD also contributes to societal well-being through its environmental, social and economic systems through student and workforce health and wellness requirements, the use of technology to reduce pollutants, and a recycling program (Figure 7.4-9).

**1.2c(2)** CSSD is highly involved with its communities, both

locally and statewide. It supports these communities through the active involvement of SL and through volunteer contributions of SL, all workforce members and students.

CSSD’s communities include the San Diego business community, the state and local educational community, the California legislature, service organizations that align with CSSD’s VMV and CC, and neighborhood businesses near RCs.

CSSD determines its key communities and their involvement by identifying those that can have a positive impact on student achievement, SI and CC and that support key stakeholder requirements as outlined in Figure P-5.

SL serve as liaisons to the SDUSD, the business community, the state educational community and the California legislature. LT members are involved with a number of local organizations aimed at improving the community, such as the San Diego Military Advisory Council and The San Diego Regional Chamber of Commerce.

The DII sits on the Charter Advisory Group (CAG) to collaborate with SDUSD on issues of charter policy, meeting agendas, developing MOUs between the SDUSD and its charter schools, and review and conduct capacity interviews for new charter developers seeking to start a charter school in SDUSD.

The Partnership and Development Coordinator and Communication Specialist are assigned to develop and cultivate relationships with community groups, partners, and social agencies. Teachers and all workforce members build relationships within their communities to help improve the community through a course called Introduction to Careers.

Community service is a graduation requirement that many CSSD students choose because they feel strongly that it is important to give back to their communities. Over the past three years, students have contributed more than 148,000 in community service to San Diego (Figure 7.4-9).

**CATEGORY 2: Strategy**

**2.1 Strategy Development**

**2.1a Strategy Development Process**

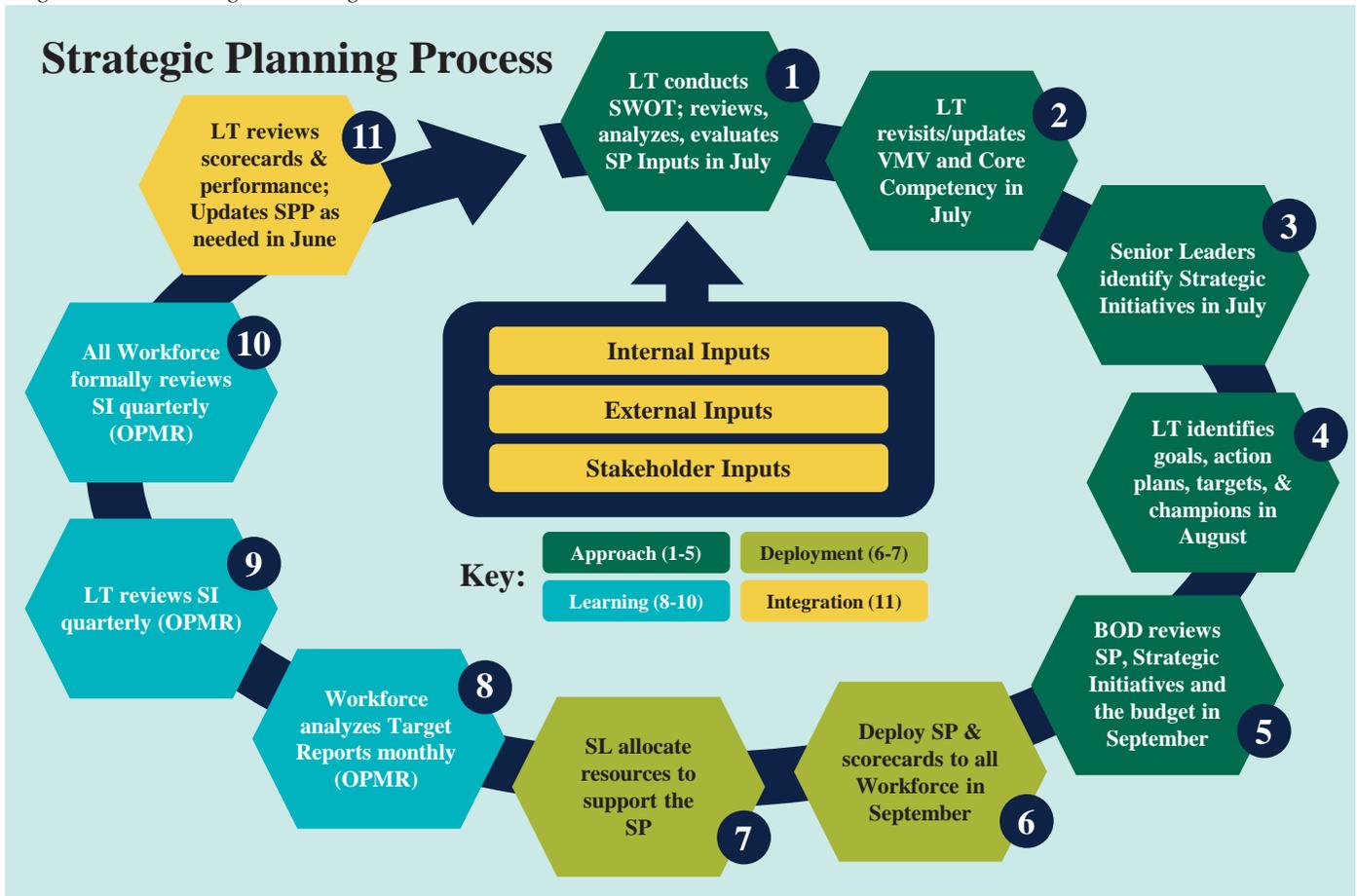
**2.1a(1)** CSSD conducts its Strategic Planning through a systematic, 11-step SPP (Figure 2.1-1). CSSD uses its SPP to achieve its Vision and Mission, meet stakeholder requirements and drive innovation in operations and instruction. The current SPP is the result of annual evaluations and several cycles of refinement.

Each of the 11 steps is a key strategic planning process step. CSSD’s SPP is owned and lead by the SL with participation of the entire LT, and it also includes selected stakeholders who provide input and participate in discussions.

Prior to officially beginning the SPP, the SL and LT gather data required for fact-based decision making. In addition to the information shown in the center three boxes in Figure 2.1-1, the LT gathers internal information that includes PPEP and key support process data. Key data points include student achievement, finance, enrollment information, curriculum, workforce qualifications, technology, and safety.

In **Step 1** of the SPP, the LT reviews, analyzes and evaluates the inputs gathered. It also reviews performance over the past years, including status of current SI, Goals, and Action Plans (AP). With this information, a Strengths, Weaknesses,

Figure 2.1-1 - Strategic Planning Process



Opportunities and Threats (SWOT) analysis is conducted to determine strategic challenges and strategic advantages.

Based on data, in **Step 2**, the LT reviews the VMV and CC to determine if circumstances warrant any revisions. With this accomplished, in **Step 3**, the SL develop SI for both short-term (two years or less) and longer-term (more than 2 years) horizons. Based on both short- and longer-term SI, the LT identifies goals, AP, targets and champions at the instructional and support department level in **Step 4**. Specific champions are assigned to ensure optimum implementation. CSSD’s BOD then reviews the SP, SI and the budget, providing feedback as necessary for approval (**Step 5**).

With the SP approved, in **Step 6** the LT begins collaborating with all workforce members to develop individual scorecards that are linked to specific SI. This allows the entire workforce to connect their role in accomplishing the organization’s goals and SI.

In **Step 7** the SL allocate the necessary resources to ensure the champions have what they need to be successful during implementation.

In **Steps 8-10** data is published daily, weekly, monthly, and quarterly through the Collaboration and Knowledge Sharing System (CKMS) (*Figure 4.2-1*) so that the LT and workforce can frequently monitor progress on SI and organizational learning can take place in a systematic way. From that learning SL can guide transformational change and shift priorities and initiatives as needed. Adjustments are then made by the LT and appropriate workforce members.

In **Step 11** the annual SPP cycle concludes with scorecard and performance evaluations that align to the SI. These evaluations serve as inputs into the next SPP cycle.

The integrated SPP combined with the CKMS process gives CSSD the opportunity to move quickly with agility to revise the SP as the educational environment, stakeholder requirements and other influences indicate the need for change. The 11-step SPP is a continuous closed-loop system that includes both short-term (2 years or less) horizons as well as longer-term horizons (more than 2 years). The SPP is fully deployed, has gone through several cycles of refinement and continues to be improved as it is measured, analyzed and evaluated on an on-going and annual basis.

**2.1a(2)** Throughout the integrated SPP the opportunity for innovation and intelligent risk taking is developed and presented as referenced in 6.1c. CSSD identifies strategic opportunities during the Strategic Planning Kickoff meetings. Recent examples of innovation that has stemmed from the Kickoff meeting include a robust, revamped professional development program delivered through Altus University and the deployment and integration of blended learning courses into CSSD’s curriculum. An English Learner pilot program was also identified as a strategic opportunity to better serve a significant market segment. SL decide which strategic opportunities and intelligent risks are worth pursuing through data gathered through the Process Design and Improvement System (PDIS) (*Figure 6.1-2*). CSSD’s current strategic opportunities are: (1)

the development of an intranet to streamline work to increase workforce efficiency, (2) expansion of the school.

**2.1a(3)** CSSD collects and analyzes relevant data and develops information for the SPP through the CKMS. The CKMS gathers information from students, parents, the workforce and other stakeholders. To analyze strategic challenges and advantages, CSSD SL evaluate collected information in *Step 1* of the SPP. A SWOT analysis is also conducted in *Step 1* to evaluate the organization’s strengths, weaknesses, opportunities and threats to identify future opportunities for intelligent risks or potential threats to future organizational success.

CSSD gathers information through regular participation in district, county, state and national meetings and conferences to assess potential changes in both the competitive and regulatory environment. This information is shared at the quarterly LT meetings and appropriate CKMS methods. Adjustments are made as needed, and the information is deployed to the entire workforce through the CKMS.

Often times, CSSD is able to prepare for changes in advance because many regulations that address educational reform are published on an advanced timeline. For example, the state has published its requirements for academic achievement as measured through assessments, and the District has approved CSSD’s charter through 2018. The Western Association of Schools and Colleges (WASC) has awarded CSSD the maximum six-year period so that it will not have another accreditation evaluation until 2017.

Through the SWOT analysis performed during Step 1 of the SPP, CSSD identifies potential blind spots in the SPP and information through analyzing inputs such as results from the Nationwide Educational Reform Tour (*Figure 2.1-2*). If appropriate, SL and the LT develop AP to address blind spots. The LT carefully monitors workforce AP progress through the OPMR.

**2.1a(4):** The key work system for CSSD is to provide neighborhood resource center locations throughout San Diego, staffed with highly qualified teachers who deliver students a PPEP (*Figure 6.1-1*) that is highly effective with documented success (*Figures 7.1-1-29*). CSSD outsources the services that do not focus on its CC. For example, Southland Technologies provide IT services. All future CC and Work Systems are determined throughout the SPP.

**2.1b Strategic Objectives**

**2.1b(1)** CSSD refers to Strategic Objectives as SI to better align with industry terminology. CSSD’s three SI, timetable for achievement, and its most important goals are shown in *Figure 2.2-1*.

CSSD is currently planning for a key change to its educational program and services. The key change is the restructuring of state standards and testing. CSSD’s workforce has worked to align instruction and curriculum to best prepare its students for the transition from the California State Standards to the California Common Core State Standards and Next Generation Science Standards. The transition to these standards has resulted in a revamped testing system – The California Assessment of

**Figure 2.1-2 Strategic Planning Process Inputs**

Internal Inputs	Stakeholder	Frequency
Core Competency	ALL	A
Vision, Mission	ALL	A
Values	ALL	A
SI/AP Completion/Progress Results	W,BOD	Q,A
OPMR	ALL	ALL
CKMS Method Feedback	ALL	O
Complaint Process	ALL	O
PPEP - Results - Feedback	S,P,W	M,Q,A
Workforce Capability & Capacity Assessment	S,P,W	M,A
Financial Analysis	W,BOD	Q,A
IT/Technology	S,P,W,SPC	Q,A
Key Support Process Measures	S,P,W,SPC	M,Q,A
Surveys	ALL	A
External Inputs	Stakeholder	Frequency
Nationwide Educational Reform Tour-Innovation	W,BOD,C	Q,A
Baldrige - Innovation	W,BOD,C	Q,A
Legislative & Regulatory Environment	ALL	Q,A,N
CEO Councils	W,BOD,SPC,C	Q,A
Competitive Market Analysis	S,P,W,C,SPC	M,Q,A
Benchmark Analysis	W,C,SPC	Q,A
SWOT	ALL	A
Counselor Visits with PS	W,SPC	Q
Social Media Monitoring	ALL	D
Website Monitoring	ALL	D
WASC	ALL	A
SDUSD Oversight Feedback	W,BOD,SPC,C	A
<i>Stakeholders: S=Students; P=Parents, W=Workforce, BOD=Board of Directors, C=Community, SPC=Suppliers, Partners, &amp; Collaborators, PS=Partner Schools</i>		
<i>Frequency: A=Annual, Q=Quarterly, M=Monthly, W=Weekly, D=Daily, O=Ongoing, N=As Needed</i>		

Student Performance and Progress (CAASPP). The CAASPP includes Smarter Balanced Assessments.

**2.1b(2)** CSSD ensures that its SI balance the needs of students and key stakeholders by remaining focused on its Vision, Mission and its CC while taking continual steps to know and understand the requirements and preferences of each stakeholder group.

By considering both short- and long-term data, planning for one-, three- and five-year horizons, and ensuring that SI are, indeed, strategic, CSSD balances short- and longer-term challenges and opportunities with SI.

**Figure 2.2-1 Strategic Initiatives, Action Plans, Measures**

<b>Strategic Initiative 1: CSSD INSTRUCTIONAL PLAN</b>				
<b>Key SC: Improve student learning, especially for an at-risk student population</b>				
	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
<b>Goal 1. Refine, Improve, and Implement the Instructional Plan to Support, Increase, and Demonstrate Student Success.</b>	Improve student achievement data as defined in the PPEP Storybook	Retain/hire HQ workforce	Dropout, Cohort Grad, Transition, Participation, and Retention Rates, Suspension, Service Learning Hours	Fig. 7.1-1-10, 22,30; Fig. 7.2-19, Fig. 7.4-9
	Improve ELA/Math assessment results	PD for HQ workforce	CAHSEE*, NWEA ELA/Math	Fig. 7.1-11-21
	Increase Student/Parent Satisfaction/Engagement	Retain/hire HQ workforce; PD on customer service	Student/Parent Satisfaction	Fig. 7.2-1-14, 17-19
<b>Goal 2. Establish and Integrate AU to Workforce.</b>	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
	Provide targeted training to workforce that directly supports student achievement	PD for HQ workforce	PD Attendance and Satisfaction	Fig. 7.3-10-11
<b>Goal 3. Continue to Offer a Safe and Supportive Environment to Customers and Workforce.</b>	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
	Update and Refine School Safety Plan	PD on Safety	Emergency Preparedness	Fig. 7.1-36
	Conduct Health and Safety Trainings	PD on Safety	Emergency Preparedness, PD	Fig. 7.1-36
	Conduct Customers Safety Surveys	PD on Safety	Student/Parent Satisfaction	Fig. 7.2-1-4
<b>Goal 4. Further Develop Programs to Increase Enrollment and Retention.</b>	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
	Improve Key Support Process Results	Retain/hire HQ workforce	HQ Teacher Percentage; Core Server Uptime	Fig. 7.3-2; Fig. 7.1-38
<b>Goal 5. Hire, Train and Retain HQ Workforce.</b>	Implement blended and online learning	Retain/hire HQ workforce; PD on online instruction	LEC trained teachers, Online Textbooks/Courses Offered	Fig. 7.3-12; Fig. 7.4-9
	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
	Develop recruitment plan for HQ workforce	Hire HQ workforce	Staffing Rates*, Vacancy Rate, Advanced Degrees	Fig. 7.1-32; Fig. 7.3-1,3
	Collaborate with AU to ensure appropriate training for all workforce segments	PD for HQ workforce	HQ Teacher Percentage, PD Attendance	Fig. 7.3-2, 10-11
	Increase workforce engagement/satisfaction	PD on Customer Service	Workforce Engagement, Satisfaction, and Retention	Fig. 7.3-4-9
<b>SA: A dynamic program driven by engaging staff and rigorous curriculum supported by technology/high quality instructional materials</b>				
<b>Strategic Initiative 2: CSSD SUSTAINABILITY PLAN</b>				
<b>Key SC: Increase in competition from other charter schools and school districts</b>				
<b>Goal 1. Receive Outside Feedback and Perspective to Remain Sustainable.</b>	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
	Use Baldrige Award Recipients for process innovation, results, benchmarking	PD on Baldrige criteria	Benchmarks, Comparisons	Cat 7 BM
	Maintain WASC accreditation	Retain/hire HQ workforce; PD	Accreditation Term	Fig. 7.4-6
	Receive positive district reviews annually	PD for HQ workforce	Audit Results, Renewal Term	Fig. 7.4-4-5
<b>Goal 2. Remain Fiscally Solvent.</b>	Increase compliance results	PD on Ethics/Compliance	Teacher Audit Results	Fig. 7.1-33
	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
Maintain positive financial performance	PD for HQ workforce	SB 740 Compliance, Budgetary and Financial Performance*	Fig. 7.5-1-5	
<b>Goal 3. Design an Effective Marketing Program to Increase Student Enrollment.</b>	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
	Develop and implement CSSD marketing strategies to enrollment	Retain/hire HQ workforce; PD on customer service	Customer Service, Social Media and Web-Based Engagement, Intake Cycle Time, Market share*	Fig. 7.1-31, Fig. 7.2-1-18,20 Fig. 7.5-6
<b>SA: First and largest charter school in San Diego County with a storied history and a strong reputation</b>				
<b>Strategic Initiative 3: CSSD EDUCATIONAL REFORM AND INNOVATION PLAN</b>				
<b>Key SC: Proactively responding to the politically charged educational environment</b>				
<b>Goal 1. Improve Student Performance and Organizational Management through Educational Reform</b>	<b>Key Action Plans</b>	<b>Key Workforce Plan</b>	<b>Key Performance Measures</b>	<b>Figure(s)</b>
	Conduct educational reform research by visiting and interviewing charter schools and educational reform movement influencers nationwide to bring back information regarding effective innovative practices to enhance the organization	SL and LT adjusts workforce duties as needed	Nationwide Educational Reform Tour	Fig. 7.4-12
<b>SA: A strong leadership team with a bold spirit centered on innovation and change with a focus on excellence</b>				
<i>* Indicate Measures with Key Performance Projections (2.2a(6)); SC = Strategic Challenges; SA = Strategic Advantages</i>				

## 2.2 Strategy Implementation

### 2.2a Action Plan Development and Deployment

**2.2a(1)** Key short- and longer-term AP are shown in *Figure 2.2-1*. AP are developed as the specific steps needed to achieve the goals of the SI. AP are developed during the SPP in Step 4 by the LT.

**2.2a(2)** CSSD fully deploys its SI, goals and AP to all workforce members at quarterly instructional and office staff meetings, which are CKMS methods. The SI and goals are first introduced to the workforce during the initial instructional and office staff meetings in September. Progress updates are provided by SL and LT members during quarterly faculty and office meetings. Frequent feedback to all workforce members is provided through the OPMR and scorecard review.

AP are systematically deployed to key suppliers, partners and collaborators, as appropriate, to ensure key SI are achieved. CSSD deploys SI and AP at the annual contracting and partnership meetings. Monthly meetings are held to update suppliers, partners, and collaborators on progress so that adjustments to AP can be made. Feedback from these regular meetings serves as an input into the integrated SPP.

CSSD ensures that key outcomes of AP can be sustained by:

- Appointing a champion for each AP
- Achieving buy-in of stakeholders
- Measuring results and analyzing and evaluating these results on a regular basis through CKMS methods and the OPMR
- Establishing modified AP to address any deviations of actual results from the Plan
- Using the Process Design and Improvement System (PDIS) (*Figure 6.1-2*) when a process needs improvement

**2.2a(3)** CSSD uses an effective, systematic approach that is fully responsive in ensuring that financial and other resources are available to support the AP while meeting the organization's current obligations. Accounting and financial reporting for local educational agencies (LEAs) such as CSSD focuses initially on funds, which are designed to enhance and demonstrate fiscal accountability. CSSD prepares cash flow of financial resources with focus on the annual operating budget and current liabilities. CSSD's BOD and SL compare the actual revenues and expenditures with the adopted budget three times a year during Board meetings. Tracking costs and resources allows SL to make effective, educated decisions and to ensure fiscal solvency. CSSD maintains awareness of pending or new legislation that impacts funding by attending state legislative meetings, and through two state and one national membership of Charter Schools advocacy organizations.

Adequate financial and other resources are established and allocated in *Step 7* of the SPP. SL responsible for finance and human resources, including the School Coordinator, participate in the SPP. This enables CSSD to consider the overall instructional, financial, operational and human resource landscape during the SPP and integrate these plans into the SP. In this way, SL ensure that resources are available and balanced to support the accomplishment of the SP and to meet current obligations. If a discrepancy occurs, either the SP is adjusted

to the resources available or responsible ways to grow the resources are determined.

CSSD manages the risks associated with the AP to ensure financial viability through the budget monitoring process. CSSD develops a budget for a single year that supports the goals of the school. When preparing the annual budget, factors such as student population; past years' experience and trends; need for new services, expansion or curtailment of existing services; estimated revenues and proposed expenditures; and governing board priorities are considered. Allocation or re-allocation of resources to support the accomplishment of the AP are also taken into consideration.

The budget process includes:

- Enrollment projections and staffing ratios
- Income projections and revenue limit calculation
- Audit of personnel database: changes in staffing, new positions, vacant positions, full time equivalency calculation and salary movement in the salary schedule such as salary step increases
- Employee Benefits: determine rates to use in projecting benefits for retirement contributions, social security, unemployment insurance and workers' compensation; and estimate increases regarding component costs of health and welfare benefit costs
- Monitor Governor's budget items for education program
- Monitor legislation or initiatives that impact funding
- Contracts in process and negotiations with key suppliers
- Non-personnel budgets based on goals and past years' experience and trends
- Fixed costs such as utilities, facility leases, service agreements and insurance

CSSD's BOD approves the budget by May of each year for the subsequent fiscal year. The budget is monitored and revised through the fiscal year to ensure that it depicts the financial operations, current obligations and that goals are met. Operating financial statements are provided to the BOD during quarterly board meetings.

**2.2a(4)** The key workforce plans that support CSSD's short- and long-term SI and AP are outlined in *Figure 2.2-1*. These plans reflect the need to hire and retain Highly Qualified workforce members who are a fit with CSSD's culture and are committed to the VMV. CSSD addresses potential impacts on the workforce members and any potential changes in workforce capability and capacity needs by creating AP to hire and train new teachers, to support current teachers and further engage both new and current teachers. Training is a special opportunity for CSSD because teachers are "home grown" from the time they were serving as Resource Center Associates (RCA) at CSSD to the time that they became certificated, credentialed teachers. More than 50 percent of certificated staff were initially hired by CSSD as a RCA. CSSD also integrates professional development into all workforce members' annual scorecards to meet its capacity needs while focusing on the capabilities and competencies of its faculty and staff.

**2.2a(5)** Key performance measures and results are shown in *Figure 2.2-1*. CSSD deliberately ensures that measures for



# 3 CUSTOMERS

the SI and AP reinforce organizational alignment by setting measures during *Step 4* of the SPP. Progress toward achieving these measures is monitored weekly, monthly, and quarterly through CKMS methods and the OPMR.

**2.2a(6)** Areas where performance projections are possible are indicated with an asterisk in *Figure 2.1-2*. These projections are determined during the SPP as measures are assigned for both short- and longer-term periods. Projections are based on past performance, anticipated future needs, changes and goals, and results. These projections meet or exceed key benchmarks, when available, goals and past performance as they reflect CSSD’s dedication to continued improvement and growth. CSSD addresses gaps in performance against competitors and comparable organizations through the quarterly LT meetings, through OPMR, and the SPP.

Competitor and comparative considerations are presented in Category 7.

**2.2b Action Plan Modification:** The LT analyzes and evaluates measures against the SP and AP on a regular basis through the OPMR process. If the measures are not tracking to the SP or circumstances indicate a change is needed, the LT representative meets with the appropriate department or group involved to develop a modified AP. If actual measures don’t reflect progress to the SP, the LT reviews the data to determine the cause. If necessary, the LT applies the PDIS to remediate the situation. The LT continues to monitor the results to ensure a correction has taken place. If an AP needs to be modified because of a change in circumstances, the LT representative and associated group or department revise the original AP or develop a new AP to reflect the change in direction.

**CATEGORY 3: Customers**

**3.1 Voice of the Customer**

**3.1a Listening to Students and Other Customers**

**3.1a(1)** CSSD listens to, interacts with, and observes students and other customers to obtain actionable information by using multiple listening approaches. For all student and market segments CSSD’s key listening methods include specific and strategic stages of the PPEP process outlined in *Figure 3.1-1*.

CSSD deploys varying methods to listen to targeted customer groups and segments. CSSD disaggregates data based on grade level, length of enrollment and significant subgroups. For example, Senior Night and Senior Exit Orientation allow CSSD to listen to students and parents of 12<sup>th</sup> grade students to obtain valuable feedback about its educational program and customer experience.

Students are surveyed throughout their length of enrollment to help teachers and the CSSD LT gauge student engagement and academic progress. For example, after 90 days, students complete a student confidence survey to compare their current level of academic confidence against their confidence of academic success when they first enrolled (*Figures 7.1-23-29*). This survey was designed to measure students’ engagement in their academic progress and chosen Pathway. The English Learner Advisory Committee (ELAC) and the Community Advisory Committee (CAC) are opportunities for students and parents within the English Learner and Special Education significant student subgroups to give additional, valuable feedback as it relates to their specific needs.

For Parents, CSSD listens, interacts with, and obtains actionable feedback primarily through the PPEP Process, social media, web-based technologies, and Open Houses.

CSSD recognizes the importance of social media and web-based technologies to listen to students and other customers. Over the past two years, CSSD has deployed and integrated multiple social media and web-based tools and strategies to obtain customer feedback that is immediate and actionable. Enrollment Request, Contact Us, Schedule a Visit, and Transcript Request forms on the CSSD website are all monitored by a designated LT member on an hourly basis so that requests can be responded to in real time. Once the online form is submitted, an

*Figure 3.1-1 Voice of the Customer*

Listening Methods	Stakeholder	Frequency
PPEP*	S,P	D,W,Q,A,N
Surveys*	S,P,W	D,W,Q,A,N
Student, Parent, Teacher Meetings*	S,P	W, N
Naviance	S	D,W,Q,A,N
Phone*	All	D,W,Q,A,N
Email*	All	D,W,Q,A,N
Home Visits*	S,P	N
Counselor Visits	S,PS	Q,N
ELAC	S,P	Q
CAC	S,P	Q
Website Forms*	All	D
Facebook*	All	D
Yelp*	All	D
Google+*	All	D
Events	All	N
BOD Meetings	All	Q
RC Meetings	S,P,W	M
Instructional Meetings	S,P,W	M
Office Meetings	S,P,W	Q
Department Meetings	All	M
Leadership Planning Form	W	A
Focus Groups	All	N
Professional Boards/ Community Organizations	S,P,C,SPC	Q,N
Charter School Collaborative	S,P,C,PS	Q,N
<i>Stakeholders: S=students; P=parents, W=workforce, BOD, C=community, SPC=Suppliers, Partners, &amp; Collaborators, PS=Partner Schools, A=All</i>		
<i>Frequency: A=annual, Q=quarterly, M=monthly, W=weekly, D=daily, N=as needed</i>		
<i>* Indicates immediate, actionable information</i>		

email is sent to the appropriate process owner and staff member to act immediately. The information for all submitted forms is stored on the back side of the website so that information can be collected, organized, and analyzed for patterns and trends on a monthly basis. CSSD also engages with and listens to all key customers and stakeholders through Facebook posts and comments, Google+ pages designed for targeted resource centers to increase geographic visibility, Great Schools and Yelp. To expand the school's online visibility, in 2015 CSSD became one of the first schools in the nation to claim and monitor its Noodle page. Noodle is a web-based tool that ranks schools based on academic achievement and student climate. All social media platforms are monitored daily by the Communications Department. Data is gathered and tracked for trends. It is shared and analyzed at the monthly Strategic Sustainability meeting and through the CKMS.

*Figure 3.1-1* illustrates how CSSD's listening methods vary across students' and parents' relationship with the school. It demonstrates how the organization listens for the life of the PPEP process, which represents the total length of enrollment.

The asterisks in *Figure 3.1-1* indicate listening methods that seek and obtain immediate and actionable feedback from students and parents on the quality of educational programs and services, support, and transactions. These key listening methods include the SSC Customer Support Survey and the MAP survey taken during the Intake Process, the Naviance My Game Plan survey that aids students, parents, and teachers in identifying the student's interests and Pathways goals; weekly parent, teacher, student meetings; email, telephone, and home visits. CSSD also obtains immediate actionable information and feedback through its closely monitored social media and web-based platforms.

**3.1a(2)** CSSD systematically listens to former, potential and competitors' students and other customers to obtain feedback on its educational programs and services, support and transactions. Potential students and other customers submit inquiries through CSSD's monitored website forms. The inquiries are addressed in real time. The content is categorized and analyzed for trends, and the results are shared with SL and LT members at the monthly Strategic Sustainability Meeting and quarterly LT meetings (*Figure 4.2-1*). Social media platforms offer a wealth of qualitative data, as do traditional school counselor visits. Twice annually CSSD faculty and staff meet with traditional school counselors to gain information about how the school can continually better serve students. For example, in 2014, a CSSD counselor learned that traditional school counselors needed summer school information on a tight timeframe in order to refer the maximum number of students to CSSD. The LT acted quickly, and a record number of students were referred to the program for summer courses. The Nationwide Educational Reform Tour and Business CEO Forum identify emerging techniques, trends, and technologies that could attract potential students.

Former student feedback is actively sought in order to continuously improve CSSD's student experience. Every student who leaves CSSD, whether a graduate or redirected student, takes an exit survey. Survey questions are designed to capture feedback relating to perceptions of teacher quality, academic achievement, and the learning environment. BOD members

place personal phone calls to graduates and redirected students to ensure their expectations were met and to identify opportunities for improvement. These findings are shared with the school's SL and appropriate LT members. Counselor visits are also an important way CSSD obtains information about former students' experiences. The traditional school counselors share with CSSD faculty and staff the success and failures of former students who have redirected to their comprehensive traditional school campus. This feedback is shared at instructional meetings, the Strategic Sustainability meeting, and the quarterly LT meetings, as appropriate.

In order to increase the quality of programs, services, customer experience, and market share, CSSD regularly seeks and obtains information from competitors' students. CSSD's Instructional, Data and Assessment, Finance, Operations, and Communications staff members annually conduct an environmental landscape audit of key competitors. Information gathered includes program design, enrollment trends, market share growth, and specialties. This information is shared at the Strategic Sustainability meeting where AP are developed to attract competitors' students. This information is also an input into the SPP (*Figure 7.5-6*). The San Diego Charter School Collaborative is a 501(c)3 organization that seeks to align all charter schools authorized by SDUSD on key issues. SL consider this information to identify potential areas of innovation, growth, and expansion during the SPP.

### **3.1b Determination of Student and Other Customer Satisfaction and Engagement**

**3.1b(1)** CSSD determines student and other customer satisfaction, dissatisfaction, and engagement through the PPEP process and a series of web-based surveys. Teachers are specially trained to gather input from students during the PPEP process. Satisfaction, dissatisfaction, and engagement information as it relates to student achievement are reported in the monthly and/or annual PPEP storybook. Teachers are held accountable for specific student engagement results to ensure academic progress. Qualitative satisfaction, dissatisfaction, and engagement feedback is recorded on the students' files in the Student Information System (SIS). Data is reviewed with the regional Learning Lead, School Coordinator, LT, and SL, as appropriate. Students also take the Student Confidence Survey after 90 days to measure student engagement, the Annual Student Satisfaction Survey, and an Exit or Redirect Survey upon completion of their enrollment. Results are collected, analyzed and segmented to determine levels and trends. All student survey results are an input into the SPP (*Figures 7.2-1,2,5,6,9,10,11,17*). Parents consistently offer feedback that Instructional staff can address immediately through the PPEP process. Satisfaction, dissatisfaction, and engagement feedback is recorded in their students' files in SIS. Immediate action to exceed parents' expectations is taken, and the action and response are recorded. Information is shared at the resource center meeting, instructional meetings, the Strategic Sustainability meeting and the quarterly LT meeting as appropriate. Monitored web-based forms and social media platforms provide opportunities for parent feedback and input on a daily basis. Parents take the Annual Parent Satisfaction Survey. Results are collected

and analyzed to determine levels and trends. All parent survey results are an input into the SPP.

Survey results are reported at the Annual SP Kickoff Meeting. The customer focus of the PPEP and Annual Satisfaction Survey questions are reviewed by SL and LT members to determine if actionable information is being captured. Using the satisfaction, dissatisfaction, and engagement data, SI, Goals and AP are developed to ensure that CSSD's key customers remain engaged for the long term.

**3.1b(2)** To obtain information on students' and other customers' satisfaction with CSSD relative to competitor organizations, CSSD has developed a series of surveys and a follow-up process for students who leave to enroll at a competing school.

The first measure of satisfaction relative to competitors is captured during the Intake Process. Both students and parents answer survey questions that indicate how the family heard about CSSD and what factors caused them to enroll. Carefully designed questions on this survey capture actionable satisfaction information that is used to help increase market share and improve the customers' experience. At the 90 day point, students take the Student Confidence Survey to gauge engagement relative to their previous school. The Student/Parent Annual Surveys measure satisfaction relative to competitors through a series of questions that were added in 2013. Survey results are reviewed during the Strategic Sustainability meeting, quarterly LT meeting, and Annual SP Kickoff meeting, as appropriate. AP are developed to continuously improve key customers' service relative to competitors and state and national benchmark schools.

### **3.2 Customer Engagement**

#### **3.2a Program and Service Offerings and Student and Other Customer Support**

**3.2a(1)** CSSD determines educational and service offerings through a multi-level approach. The Nationwide Educational Reform Tour identifies emerging techniques, trends, and technologies that can lead to innovation, increased student engagement, and better academic results. Additionally, CSSD closely monitors national and state dropout data, community demographics, and local school district results to determine community educational needs.

CSSD actively and regularly seeks input from the business community to determine employability skills needed for today's graduates and closely monitors competitor offerings to tailor a program that best meets student needs. Student/Parent Satisfaction Survey results, and MAP Intake results drive specific program and service offerings and support. The appropriateness and success of program and service offerings and customer support are continuously monitored through the OPMR (*Figure 4.1-1*), the CKMS (*Figure 4.2-1*), and the SPP (*Figure 2.1-1*).

CSSD identifies and adapts program and service offerings to meet the requirements and exceed the expectations of students and customers through innovation fostered by professional conferences, professional representation on diverse community and professional boards and organization memberships. Additionally, the Annual Satisfaction Surveys ask how the school can "WOW" the customer. This information, along with

PPEP customer focus and engagement data, filters into the SPP. Once SL and the LT identify a new program or change that needs to be made, it is facilitated through the PDIS (*Figure 6.1-2*).

The organization's Facility Identification Process and Marketing Process are utilized to identify and adapt service offerings to enter new markets, to attract new students, and to create opportunities to expand relationships. Before CSSD enters a new market, SL perform extensive research to ensure community need and demographics align with CSSD's VMV, program design, and SP. Simultaneously, competitor market research is performed to gain competitor information that includes location, program design, enrollment trends, market share growth, and specialties. Once a location is secured, mass marketing campaigns that include television, radio, outdoor media, and print advertising are deployed, as appropriate. CSSD LT members and faculty meet with the traditional school district administration and counselors to formalize a partnership. Grassroots marketing occurs to maximize visibility and community understanding. Enrollment is monitored on a weekly basis. Results of how enrolled students heard about CSSD, in addition to enrollment trends, are reported at the Strategic Sustainability meeting. AP are developed to further engage students, parents, and the community at large. Progress is monitored through the OPMR and SPP.

**3.2a(2)** Several processes and systems are integrated to enable students and other customers to obtain educational programs and services from CSSD. Students learn about CSSD through the Marketing Process. Clear messaging that aligns with the organization's VMV is distributed through mass media and grassroots campaigns and through a partnership with the traditional school district. During the Intake Process students and parents learn more specific information regarding the student's individualized education plan. The PPEP is the key process to deliver the student's personalized educational plan geared toward the student's interest and chosen Pathway. Frequent and clear communication between CSSD and enrolled families is streamlined through the CKMS. Key access and communications methods include face-to-face, teacher's direct phone line, email, and monitored website forms.

CSSD SL and LT members collect, report, and analyze all levels of listening data to determine students' and other customers' key support requirements. Data is reported at the Strategic Sustainability meeting, quarterly LT meetings, and at the Annual SP Kickoff meeting. Identified key support requirements are continuously monitored and deployed through the Strategic Sustainability meeting, the OPMR, the CKMS, and the SPP.

**3.2a(3)** Since 1994, CSSD has been committed to serving students who are at risk of dropping out of school. This student group and market segment is written in the school's charter, which originated based on the needs of the local community, and remains intact today. Demographics of the authorizing district, ASAM reporting requirements and pre-determined state reporting requirements drive CSSD's market segmentation.

Aggregated data from the Nationwide Educational Reform Tour to identify emerging techniques, trends, and technologies

# 4

## MEASUREMENT, ANALYSIS & KNOWLEDGE MANAGEMENT



is reviewed and analyzed during the SPP to identify current and future student and market segments. Community demographics, the local school district’s academic achievement results, competitor locations and offerings, and feedback from the Annual Student/Parent Satisfaction Surveys help round out the data picture. New market segments are identified to pursue for growth through the SPP.

**3.2b Student and Other Customer Relationships**

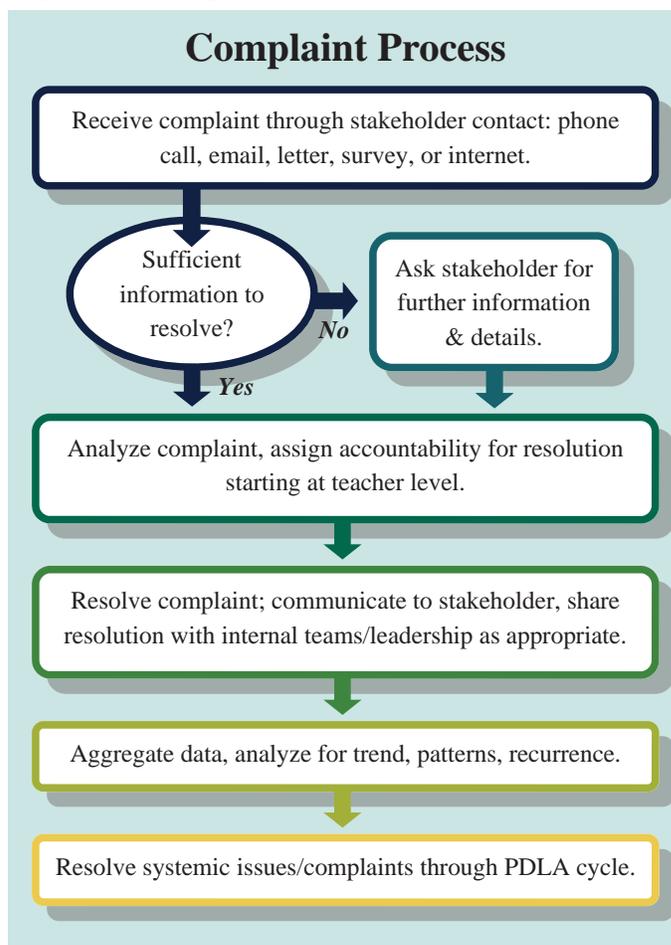
**3.2b(1)** CSSD builds and manages relationships with students and parents primarily through the PPEP. The Marketing Process, which is owned by the Communications Department, supports the teachers and all workforce members in providing a systematic structure to establish and strengthen relationships. CSSD acquires new students and builds market share by carefully selecting neighborhood locations that will appeal to its targeted market segments. This is accomplished through the Facility Identification Process. Market research to identify competitor’s specialties is used to tailor marketing messaging to differentiate CSSD from key competitors. The message is delivered to targeted customer groups and market segments through the marketing plan that includes mass media and grassroots campaigns and building relationships with community partners and the local school district.

CSSD enjoys a highly visible, strongly managed brand within the communities it serves. The brand is managed by the school’s Communications Department. The Communications Department has developed a style guide that formalizes logo usage, color palettes, font selection, and key messaging. The style guide has been distributed to all members of the LT, which represent all organizational departments. Consistent school branding is reflected in all organizational marketing campaigns, collateral materials, letterhead, presentation templates, and documents. Aggregated data from listening methods is an input into the SPP that helps inform changes made to the school’s image/brand. Changes are managed by SL and through the PDIS.

Student retention by exceeding students’ and parents’ expectation is engrained in the CSSD culture. SI are developed through the SPP to ensure that customer expectations are exceeded. The CEO personally teaches a 90 minute course on CSSD’s customer service, student-focused culture during orientation. This culture is reinforced during every faculty and staff meeting and daily interactions with SL and LT members. Student retention rates are closely monitored on a monthly basis. Student and Parent Survey results are also monitored on a monthly basis at the Strategic Sustainability meeting to identify areas where the organization can improve its customer engagement. AP are developed through the SPP and are monitored through the OPMR and CKMS. Student retention and satisfaction results are reported and analyzed at the Annual SP Kickoff meeting to inform SI.

CSSD has deployed and integrated multiple social media strategies to strengthen and increase brand recognition and customer engagement. Through Facebook posts and comments, Google+ pages designed for targeted resource centers to increase geographic visibility, Great Schools, Noodle and Yelp, CSSD is better able to tout accomplishments and to tell its story rapidly and to a broader audience. All social media platforms are

Figure 3.2-1 Complaint Process



monitored daily by the Communications Department.

**3.2b(2)** The CSSD Complaint Management Process is illustrated in *Figure 3.2-1*. This systematic approach to complaint management helps CSSD resolve comments or complaints quickly at the closest level possible to resolve complaints promptly and effectively to recover students’ and other customers’ confidence. Resolution of a complaint typically occurs at the teacher level. Complaint information is recorded in the SIS. Complaint data is aggregated by the Regional Instructional Leads and School Coordinator to identify trends.

If a complaint cannot be resolved at the teacher level, CSSD follows its Uniform Complaint Policy that outlines next steps and specific timelines. A complete copy of the Uniform Complaint Policy is Available on Site (AOS).

**CATEGORY 4: Measurement, Analysis, and Knowledge Management**

**4.1 Measurement, Analysis, and Improvement of Organizational Performance**

**4.1a Performance Measurement**

**4.1a(1)** The use of data and information is integrated into CSSD’s daily operations and overall organizational performance. Data

is selected based on its ability to support fact-based decision making. The three main categories of measures are SI measures, PPEP measures, and support process measures. These align to and support the accomplishment of the SI.

Data is collected and tracked electronically through School Pathways Student Information System (customer and workforce), MIP Fund Accounting software (operational), Traceability Made Easy (TME) (operational) and surveys, as appropriate.

Data is aligned and integrated through the Collaboration and Knowledge Management System (CKMS) (Figure 4.2-1). The CKMS is the process by which CSSD deploys the SI, goals and individual workforce scorecards (AP). Key organizational performance measures, including key short- and longer-term measures, are listed in Figure 2.2-1. Progress on achieving SI is frequently tracked and monitored through the Organizational Performance Measure Review (OPMR) process (Figure 4.1-1).

**4.1a(2)** CSSD has multiple approaches for the selection and use of comparison data. Focus is largely on the selection of specific measures in association with the OPMR and overall educational trends across the nation for educational reform.

As stated in the Organizational Profile, comparing CSSD to other traditional schools is not a valid comparison because charter schools do not have a nationwide, organized method of collecting data for student outcomes. This is partially due to the various purposes of charter schools across the nation. Therefore, CSSD compares locally to other charter schools in its marketplace that are also similar in design and purpose associated with the ASAM requirements. These dictate that 70% of total enrollment is comprised of high risk students who are expelled, wards of the court, pregnant and/or parenting, recovered dropouts, and/or habitually truant. This approach enables CSSD to compare to competitors to protect its high market share and outstanding student achievements. (Figures 7.5-6, 7.1-1-22).

For the OPMR, LT members take responsibility as champions for assigned measures based on their own areas of knowledge and expertise. Each LT member is responsible for researching comparable benchmarks. This data is then reviewed together during the LT meeting where decisions are made to select appropriate benchmarks. Benchmarks are selected based on what is available and what is most meaningful to accomplish the overarching goals and SI for CSSD. Benchmarks are purposefully selected to propel CSSD forward toward higher accomplishments. Higher performance than its own outcomes is highly desired when selecting comparisons. For example, CSSD uses Baldrige recipients across industries to benchmark results and processes to inspire innovation and to improve results.

For educational trends, the Nationwide Educational Reform Tour was initiated by the BOD to seek nationwide research on charter school successes, as well as failures, to aid CSSD’s knowledge to effectively plan for a sustainable future. Given the 40% failure rate of charter schools in California, this project has become one of the most important tools to CSSD’s future planning. This project has invested more than 2,000 hours of time by the CEO and the Director of Educational Reform and is reflective of CSSD’s sincere dedication to learning and, ultimately, the organizational commitment to *Transforming*

**Figure 4.1-1 Organizational Performance Measure Review (OPMR)**

SI	Key CKMS Method	Frequency
SI 1: Instructional Plan	Leadership Team Meeting	Quarterly
	Instructional Meeting	Every 2 Months
	Lead Meeting	Monthly
	Resource Center Meetings	Monthly
	Individual Workforce Meetings	As Needed
	APAC Meeting	Monthly
	Faculty Meeting	Quarterly
	Office Meeting	Quarterly
SI 2: Sustainability Plan	BOD	Quarterly
	Leadership Team Meeting	Quarterly
	Strategic Sustainability	Monthly
	Capability and Capacity Assessments	Weekly, Monthly, Annually
	Faculty Meeting	Quarterly
	Office Meeting	Quarterly
SI 3: Educational Reform and Innovation Plan	BOD	Quarterly
	Leadership Team Meeting	Quarterly
	Strategic Sustainability	Monthly
	Faculty Meeting	Quarterly
	Office Meeting	Quarterly
	Individual Workforce Meetings	As Needed

*Lives.* CSSD is hungry for best practice knowledge, as well as failures, as lessons are learned from both perspectives.

**4.1a(3)** CSSD strategically uses a variety of approaches to listen to its key customers and stakeholders to obtain actionable information outlined in Figure 3.1-1. Data is selected based on the key customer requirements and expectations. VOC and market data are reviewed on an on-going basis through the CKMS. At the monthly Strategic Sustainability meetings and the quarterly LT meetings, all data, including complaints and social media, is reviewed for levels, trends, comparisons and integration. Action plans are built based on trends and results to build a more student-focused culture and to support operational decision making.

Social media is monitored daily by the Communications Department, which enables CSSD to provide immediate response and feedback to customers and stakeholders.

**4.1a(4)** Through the integration of the CKMS and the OPMR, CSSD remains agile in its decision making processes. The OPMR’s key to success is the frequent monitoring of key performance measures and its alignment to the SI. This process includes opportunities for learning that allow CSSD to respond to relevant rapid or unexpected internal and external changes.

SL work collaboratively with the LT and can call an all hands

on deck meeting to adjust priorities and resources on a *turn of a dime*. The ability to respond rapidly to change is one of the reasons that CSSD has excelled in a competitively challenging environment. The LT promotes organizational agility that is built into CSSD's culture and practices. Traditionally, these rapid changes are associated with legislation, market changes, and student needs.

**4.1b Performance Analysis and Review** CSSD's performance and capabilities are reviewed through the OPMR where learning takes place by the LT and entire workforce. Consideration of customer and comparative data is a key input in the SWOT analysis of the SPP. The SPP is the foundation of the identification and integration of CSSD's Performance Measurement process – OPMR. Organizational performance is reviewed by LT during the LT meetings. This is an all-day meeting in which each LT member reports out on his or her department scorecard that are aligned to the SI and goals. Each LT member represents an individual department that encompasses all workforce members. All workforce members have individual scorecards that have been created in the similar design as the Strategic Plan. The components of the scorecards include individual targets that are tied to AP that support goals that align to SI. LT and department scorecard reviews include the status of performance measures. Next steps and constraints are discussed. Feedback is encouraged and there is a collaborative discussion amongst LT members to ensure that goals are accomplished. Each LT member is responsible for communicating any action items or feedback to their departments as needed.

CSSD has a two-pronged approach to ensure conclusions are valid. CSSD uses the LeTCI model for studying results, including benchmark performance data, which is one indication of the validity of conclusions drawn from performance reviews. Secondly, CSSD appreciates the BOD oversight to provide external expertise and feedback to validate conclusions. Outstanding results as demonstrated in Category 7 are an indicator that conclusions are valid.

CSSD and its SL assess organizational success, competitive performance, financial health, and progress on achieving SI and action plans through the OPMR. Performance results are reviewed by Instructional (PPEP) and support process categories.

The PPEP Storybook (instructional process results) is a monthly and annual detailed results review focused on instructional outcomes. It is prepared by the Data and Assessment department and ultimately provides CSSD a single source for reviewing all pertinent student outcome results. Examples of reports include Student Demographic Reports, New Student Data Reports, Student Participation Reports, Student Confidence Survey Results, Graduate Data, Student Achievement Results, Dropout Data, Retention and Redirection Report, and Key Customer Survey Results. The data is segmented by school-wide, region, resource center, and individual teacher. Several results from the PPEP Storybook are reflected in the instructional staff scorecard. All student outcomes for CSSD are reported in the PPEP Storybook.

Key support process results are analyzed at the department level. These departments are Curriculum and Professional Development, Special Instructional Services, Finance,

Communication, Data and Assessment, Student Services Center, Operations and Human Resources. Quarterly and annually, departments report out on achieving SI, goals and action plans.

Competitive performance is assessed annually through competitor analysis by a combination of Communications, Data and Assessments, and the Instructional departments.

Fact-based decisions are made based on the performance results. Data is a key input into decisions. SL embrace change as evidenced through the Nationwide Educational Reform Tour.

CSSD's Basic Value of running the organization as a business model allows it to rapidly respond to changing needs and challenges, as referenced in 4.1a(4).

CSSD's BOD reviews the organization's performance and its progress on SI and Action Plans at its regular, annual, and special board meetings. At the quarterly regular meetings, BOD members receive updates on the organization's performance through the agendaized President's Report and prepared materials. Materials include instructional results (*Figure 7.1-1-30*), organizational performance results (*Figures 7.1-31-38, 7.2, 7.3, 7.4*), and current financial reports and projections (*Figures 7.5*). At the annual meeting, the BOD reviews and approves annual performance measures and results, as well as the budget actuals for the current fiscal year and the proposed budget for the next fiscal year. Special meetings are scheduled as needed to address specific instructional and organizational needs.

#### **4.1c Performance Improvement**

**4.1c(1)** CSSD shares best practices throughout the entire organization through the CKMS (*Figure 4.2-1*). The CKMS is deployed to all workforce segments through regularly scheduled meetings that are designed to monitor SI, goals, and action plans. The LT regularly reviews scorecard results and performance to identify organizational best practices and high performing workforce members. LT members identify the best practices that best support the organizational SI, goals and action plans and share them across the organization through appropriate CKMS methods. For example, audit results are an important monitoring tool for teacher compliance. Through the monthly monitoring of the PPEP Storybook results and the regular monitoring of teacher scorecards, the organization learns about and identifies best practices and high performances regarding compliance. These best practices and high performers are held up as role models and are designated as trainers throughout the CKMS. The result of this knowledge sharing is demonstrated in the increased teacher compliance (*Figure 7.1-33*).

**4.1c(2)** CSSD projects its future performance through the OPMR. Internal performance review data is aggregated, analyzed and reported at quarterly LT meetings and the Annual Strategic Planning Kickoff Meeting. Throughout the year CSSD collects and analyzes key comparative and competitive data that helps benchmark and drive higher results. Through the OPMR CSSD adjusts its action plans to increase student achievement results and to ensure key customer needs are met. Key student achievement results, (*Figure 7.1-1-22*), market share (*Figure 7.5-6*) and positive net operating (*Figure 7.5-1-2*) results demonstrate the success of this approach.

CSSD reconciles differences between projections of future

Figure 4.2-1 Collaboration and Knowledge Management System (CKMS)

SH	CKMS Method	Frequency	Participants	Integration Points
Students and Parents	Pathways Personalized Education Planning (PPEP)	Daily	Student, Parents, Teacher, Counselor, Lead, and Pathways Specialist	CC, VMV, SI, VOC
	Student/Parent Online Portal	Daily	Student, Parent, and Teacher	CC,SI
	Student/Parent Survey (Satisfaction Survey/Graduate Survey/Redirection Survey)	Annually, Ongoing	Student, Parent, Teacher, Lead, LT	CC, VMV, SI, VOC
	Resource Center Open House	Annually	Students, Parents, Community Members, Teachers, Leads, Counselors, SL	CC, VMV, SI, VOC
	Senior Night/Senior Exit Orientation	Annually	Seniors, Parents, Counselors, Teachers, Leads, Counselors, SL	CC, VMV, SI, VOC
	English Learner Advisory Committee (ELAC)	Annually	Curr & PD Coordinator, Special Instructional Services Coordinator, and Parent representatives	CC, VMV, SI, VOC
Workforce	Workforce Surveys (Satisfaction/Ethics/Meeting/PD Evaluations/As Needed)	Annually	All Workforce Members (Instruction, Support Staff, LT)	CC, VMV, SI, VOC
	Altus University (Full Offerings AOS)	Daily	All Workforce, Visiting/Guest Speakers and Trainers	CC, VMV, SI, VOC
	Altus Pathways Advisory Council (APAC) Meeting	Monthly	Curriculum & Professional Development Coordinator, Pathways Department Lead, Curriculum Lead, NWEA MAP Lead, School Pathways Lead, Naviance Lead	CC, VMV, SI, VOC
	Curriculum Department Meetings	Monthly	Teachers assigned to subject-area department based on expertise and request	CC, VMV, SI, VOC
	Faculty Meetings	Quarterly	Instructional Staff and LT	CC, VMV, SI, VOC
	Instructional/Lead Meetings	Every 2 months	Instructional Staff, Leads and LT	CC, VMV, SI, VOC
	Resource Center Associate (RCA) Training	Every 2 months	RCAs and Teacher Leader	CC, VMV, SI, VOC
	Resource Center Meetings	Monthly	Teachers, Resource Center Associates, Learning Lead, Counselor	CC, VMV, SI, VOC
	Lead Meeting	Monthly	School Coordinator and Learning Leads (4)	CC, VMV, SI, VOC
	Office Meetings	Quarterly	Support Staff and LT	CC, VMV, SI, VOC
	Leadership Team Meeting (SPP/SI Review)	Quarterly	Leadership Team	CC, VMV, SI, VOC
	Strategic Sustainability Meetings	Monthly	SL, LT, Head Counselor, Data Analyst	CC, VMV, SI, VOC
	Workforce Leader Support Training and Special Projects	As needed	Members selected based on their leadership interest, potential for Best Practice Sharing in specific areas	CC, VMV, SI, VOC
	Capability and Capacity Assessments	Weekly, Monthly, Annually	OHRA, School Coordinator, LT Members, as needed	CC, VMV, SI, VOC
	Individual Workforce Member Meetings	As needed	Workforce member and LT	CC, VMV, SI
	Executive Safety Committee	Quarterly	DII, OHRA, School Nurse, Administrative Associate	CC, VMV, SI, VOC
Other Stakeholders	Board of Directors (BOD)	Quarterly	BOD Members, Community, Parent, Business Representatives, SL	CC, VMV, SI, VOC
	CEO Council (BOD, Community, Suppliers, Partners, Collaborators)	Annually, As Needed	Local Business leaders	CC, VMV, SI, VOC
	Community Support and Influence (Community, Partners, Collaborators, Partner Schools)	Monthly	SL and LT Members as appropriate	CC, VMV, SI, VOC
	Community Collaborator Partnerships	As needed	Partnership and Development Coordinator, targeted community organizations that support student and school	CC, VMV, SI, VOC
	Supplier Process Review	Quarterly, Annually	CFO, LT Member as appropriate	CC, VMV, SI, VOC
	Counselor Visits (Partner Schools)	Quarterly	Lead, Counselor	CC, VMV, SI, VOC
	SL Communication Plan (see chart)	Ongoing	SL	CC, VMV, SI, VOC

SH: Stakeholder, CC: Core Competency, VMV: Vision, Mission, Values, SI: Strategic Initiatives, VOC: Voice of Customer/Data

performance and performance projections developed in key action plans at the monthly Strategic Sustainability meetings and at the quarterly LT meetings. If actual measures do not reflect progress, the LT performs a root cause analysis and applies the PDIS (Figure 6.1-2) to reconcile differences. CSSD remains agile in evaluating performance through the refined integration of results and the SPP, as referred to in 2.2a(6).

**4.1c(3)** The OPMR provides structured feedback points and data analysis to develop priorities for continuous improvement and opportunities for innovation. These priorities and opportunities are deployed through the CKMS to all workforce segments. Appropriate workforce members attend a variety of professional learning opportunities in order to improve and innovate within their departments.

CSSD looks outside the education sector to benchmark and find world-class practices that encourage continuous improvement and foster innovation. Many of these practices are identified through the Nationwide Educational Reform Tour and Baldrige knowledge sharing. Merits of practices and ideas are reviewed by SL. Research and data are gathered to determine the appropriateness and potential impact of the innovations and ideas. The practice and innovation is developed through the PDIS and is integrated through the CKMS. Benchmarks are then established to ensure continuous improvement. When CSSD implemented an online curriculum option, regular monthly meetings were established between CSSD staff, Edgenuity, and School Pathways in order to create a bridge to link and integrate both suppliers' systems. Quarterly meetings between CSSD and these suppliers continue to be scheduled as needed to ensure organizational alignment.

**4.2 Knowledge Management, Information, and Information Technology**

**4.2a Organizational Knowledge**

**4.2a(1)** CSSD manages organizational knowledge and collects and transfers workforce knowledge through various CKMS methods (Figure 4.2-1).

CSSD blends and correlates data from different sources to build new knowledge by incorporating the OPMR process into specifically selected CKMS methods. These methods allow for collaboration and sharing between all workforce members. Structured agendas addressing items that incorporate stakeholder requirements and VOC feedback, innovation, and that align with CSSD's Core Competency, VMV and SI are developed. These methods allow employees to hone their craft, learn and share new strategies within and outside their area of expertise. Sharing best practices is a regular agenda item at all workforce related meetings. Ongoing enrichment and training activities are provided through regularly scheduled professional development sessions. The venues or tools for transferring and managing knowledge may include in person meetings, video conferencing, CSSD's website, the Network (Shared Drive), and School Pathways. Recently, CSSD has implemented the ability to video record presentations and trainings that can be posted to the secure Network as an improved method to transfer workforce knowledge. Published Storybook data is also used monthly and annually to transfer knowledge amongst workforce.

**Figure 4.2-2 Data and Information Quality and Security**

Figure 4.2-2 Data and Information Quality and Security	
Property	Mechanism
<b>Quality Verification</b>	Culture of accountability
	System of checks and balances
	Extensive and on-going training
<b>Accuracy and Validity</b>	Extensive and on-going training
	System of checks and balances
	Evaluation of experience and skill set
	Audits
	Cross check and supervisor review for data entry
	Consistent file format
	Standardized data entry items
<b>Integrity and Reliability</b>	Review process of data and measures (OPMR)
	Initial research of software prior to purchase
	Code of Ethics
	Audits
	Internet Use Agreements
	Monitoring and regular system back-ups provided by Southland
	Standardization and uniformity of software
<b>Currency</b>	Data deadlines
	Master Calendar with due dates
	Audits
	Scorecards with timeline targets aligned to expected results
<b>Security and Confidentiality</b>	Password protection for internal security
	"Read-only" designations for shared files on the network drive
	Firewall protection for external security
	Policies and procedures for student records
	Anti-virus software
	Network system maintenance provided by Southland
	Document destruction
	Administrator rights within the information system
Periodic audit review of access rights	

To ensure the transfer of relevant knowledge, the CKMS is segmented to include all stakeholders. Through the daily engagement in the PPEP, CSSD teachers transfers knowledge to students and parents via face to face meetings, phone calls, emails, and CSSD's website. The online student and parent portal through School Pathways allows students and parents to access course assignments and grades at any given time. Knowledge is also transferred through Open Houses, Senior Nights, Senior Exit Orientation, and the ELAC. CSSD transfers knowledge to other stakeholders including suppliers, partners and collaborators through the CKMS methods as seen in *Figure*

4.2-1.

CSSD assembles and transfers relevant knowledge for use in the SPP during the annual SP Kickoff Meeting. CKMS method results and feedback are key inputs to the SPP. When strong processes and systems integrate (LMS, SPP, OPMR, CKMS, PDIS) with the sharing of data and different areas of expertise, true innovation occurs. The Nationwide Educational Reform Tour learning is also a key input into SPP and its role in innovation. Findings from the tour are shared with all workforce members.

**4.2a(2)** CSSD uses knowledge and resources to embed learning in the way the organization operates through the OPMR and the CKMS. The OPMR provides the framework for data review, analysis, progress monitoring, and comparative benchmarking to allow for continuous organizational learning. Through this learning adjustments can be made to ensure that AP are achieved. Adjustments are shared through the CKMS methods. Results are integrated into the SPP.

**4.2b. Data, Information, and Information Technology**

**4.2b(1)** CSSD verifies and ensures the quality of organizational data and information and manages organizational data and information to ensure accuracy and validity, integrity and reliability, and currency through the mechanisms listed in *Figure 4.2-2*.

**4.2b(2)** CSSD ensures the security of sensitive and privileged data and information, ensures confidentiality and appropriate access, and oversees cyber security of its information systems through the mechanisms listed in *Figure 4.2-2*.

**4.2b(3)** CSSD ensures the availability of organizational data and information to the appropriate stakeholders through fully integrated Information Technology (IT) systems (*Figure 4.2-3*). Key components of the IT system are: Network Drives, School Pathways Student Information System, Edgenuity, NWEA, Naviance (customer and workforce), MIP Fund Accounting software, payroll system, Traceability Made Easy (TME) (operational), survey and school website, as appropriate.

Data and information from the IT systems is made available in user-friendly formats and in a timely manner to meet all key stakeholder requests and needs (*Figure 4.2-3*). Applicable data and information is available through the IT systems, available on paper, in person, through the Internet, mail and email.

Data and information is deployed through the IT system components as well as CKMS methods to all key stakeholders. Each IT system is assigned a champion whose information is delivered in a timely manner to appropriate stakeholder groups.

**4.2b(4)** Reliability, security and user-friendliness are all requirements of the IT systems. After extensive research and consultation with experts in the industry, CSSD verifies these attributes prior to system purchase (*Figure 4.2-4*).

The CBO and Human Resources and Operations Administrator manage CSSD’s technology resources and coordinate the technology plan with the assistance of outside providers, community experts, and end users. OHRA solicits

*Figure 4.2-3 Information Technology Systems*

Secure System	User Friendly	Timely	SH	Champion
CSSD Network	Network Drives	Real-time	W	OHRA
SPSIS	Web-database	Real-time	W	DAC
Edgenuity	Web-interface	Real-time	S,P,W	CPDC
NWEA	Web-assessment	Real-time	S,P,W	DAC
Naviance	Web-interface	Real-time	S,P,W	CPDC
MIP	Network System	Real-time	W	CBO
Payroll	Network System	Real-time	W	CBO
TME	Web-database	Real-time	S,P,W	OHRA
Surveys	Web-survey	Quarterly	W	LT
School Website	Web-interface	Real-time	All	COMMS

*SH=Stakeholder, S=Student, P=Parent, W=Workforce, SPC=Suppliers, Partners, Collaborators*

feedback from end users about the reliability and user-friendliness of the current systems and identifies any technical challenges and training needs. According to the feedback, these are resolved through an outside supplier and through the CKMS.

Network security is handled through a Sonicwall NSA 2040 Security Appliance, Trend Micro Client/Server/Messaging Suite and Commtouch Anti-Spam Enterprise Solution. Network users are required to change passwords every 90 days as an additional method of security.

CSSD keeps current with software and hardware systems through frequent contact with its service providers and other industry experts. Key stakeholders are surveyed in regards to the type and use of hardware and software. This input is gathered and used during the SPP to form short- and long-term technology plans.

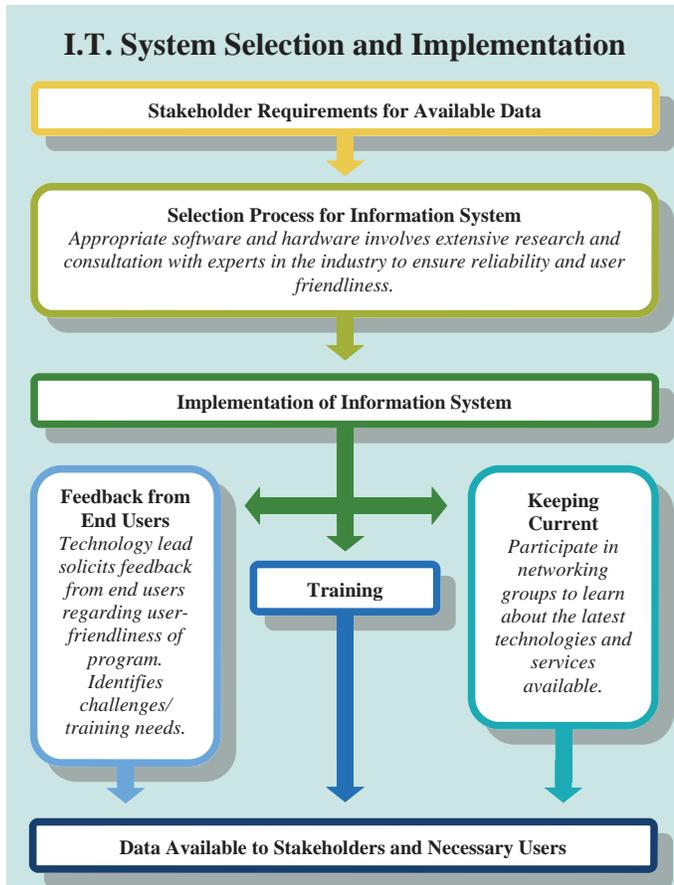
**4.2b(5)** In the event of an emergency, CSSD ensures that hardware and software systems and data are secure and available to effectively serve students and parents and organizational needs by outsourcing the support of IT systems. Southland Technology manages security and disaster recovery procedures. Southland backs up servers each night to the tape drive housed at the redIT datacenter, a business-to-business co-location, Internet, and managed data services provider. These backups are taken to another off site location weekly. All critical server systems are virtualized, allowing for enhanced backup and recovery procedures. In case of an emergency, data can be restored to the Southland Data Center, running atop a Storage Area Network (SAN) attached to a Vmware cluster. Southland maintains a compatible tape drive for restoration purposes. CSSD also has internal policies and procedures for data disaster recovery. Virtualization of the server hardware is done after the restoration of server images. Public Domain Name Service (DNS), hosted by NextLevel Internet, would then be redirected to the Disaster Recovery (DR) site. A Virtual Private Network (VPN) tunnel currently exists between CSSD and the Southland Data Center. Filtering restrictions on the Southland firewall can be adjusted along with one route on the CSSD firewall to return internal access to faculty, staff and students.



**WORKFORCE**

**5**

Figure 4.2-4 I.T. System Selection and Implementation



**CATEGORY 5: Workforce**  
**5.1 Workforce Environment**

**5.1a. Workforce Capability and Capacity**

**5.1a(1)** In order to build an effective and supportive workforce environment, CSSD uses a Workforce Learning and Development System (WLDS) (Figure 5.1-1) that allows the organization to remain agile and responsive to changing needs for all workforce segments. The WLDS process is managed through the efforts of Human Resources (HR). Associated data and outcomes, such as capacity needs, are analyzed during the annual SPP as well as throughout the year during the LT, Strategic Sustainability and Capability and Capacity meetings.

Capability and capacity for all workforce segments are assessed as part of the WLDS process. As seen in Figure P-2, CSSD segments its workforce into three key employee groups: instructional staff, support staff, and leadership. Capability and capacity needs are formally reviewed through four CKMS methods. Data is reviewed monthly through the Capability and Capacity meeting and then shared with other LT during the monthly Strategic Sustainability meeting, four times per year during the HR report out in the LT meeting as well as thoroughly analyzed annually during the SPP. In collaboration with the CBO and DII, the Operations and Human Resource Administrator develops staffing projections as an input into the SPP. Projections and actuals are reconciled weekly so that

proactive adjustments can be made quickly to ensure continuity, to minimize reductions and to manage growth.

During the various meetings, data is shared and reviewed to monitor workforce capability and capacity to identify gaps. With 75% of CSSD’s workforce being instructional, most hires are teachers, RCAs or related support staff. For these hires, the Capability and Capacity Assessment meeting involves the School Coordinator, Learning Leads, and Operations and HR administration. Inputs include possible changes in student performance, pathways, and skill level; Highly Qualified and credential status; scorecards, and feedback from the Leadership Planning form, as appropriate for the meeting venue. The Leadership Planning form is an annual tool associated with the SPP and is completed to assess resource center location preference, student advisory and curriculum focus, and interest in other leadership opportunities.

During all meetings, strong focus is on student achievement which may lead to the identification of potential gaps. Staffing adjustments are made, as needed. For example, through the deployment and integration of the WLDS, CSSD analyzed student math performance data and determined a need to focus professional development on helping instructional staff better teach math. Through CSSD’s State approved training program, Verification Process for Special Settings (VPSS), the school was able to increase the number of teachers that are HQ in math

Figure 5.1-1 Workforce Learning and Development System



(Figure 7.3-2).

This process, coupled with the high value placed on individual workforce members, is so effective that in the history of the organization a staff reduction has not occurred. As a result, since 2011, CSSD has added approximately 30 workforce members and maintained about a 90 percent retention rate.

Each workforce segment’s capability and capacity assessment review is aligned with goals and SI. Hiring and placement decisions are made based on outcomes.

**5.1a(2)** The analysis and consequential decisions that are derived from the processes described above drive the recruitment, selection and retention processes.

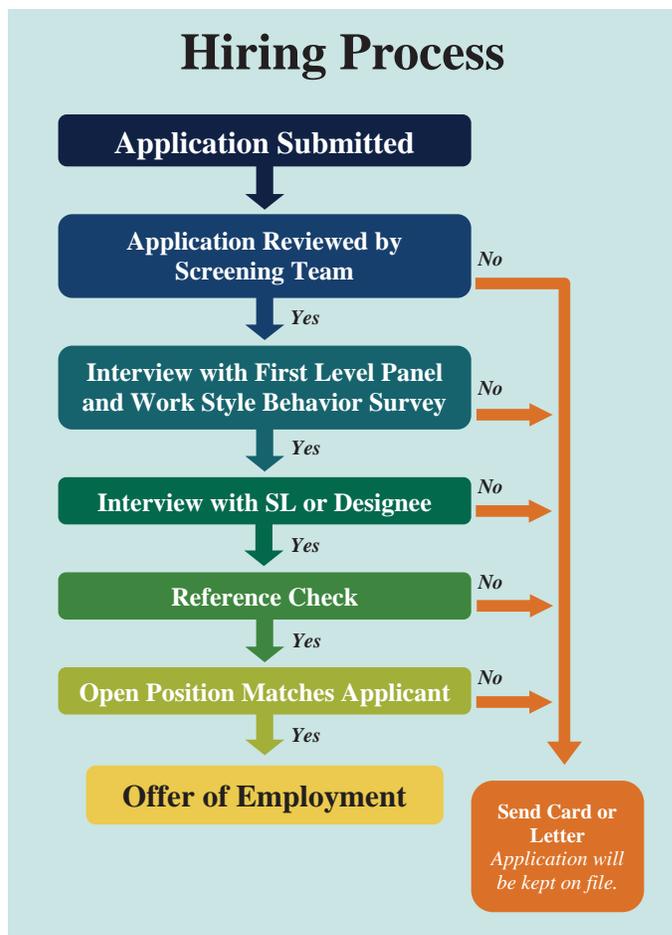
*Recruitment:* Through the SPP, Capability and Capacity Assessment, VOC key requirements, and student academic needs, CSSD identifies characteristics and skills needed for its workforce. Job descriptions are created to ensure successful candidates represent the diverse ideas, cultures, and thinking of the CSSD learning community. Job descriptions are posted on Edjoin and other online job posting sites to ensure broad distribution to reach the maximum amount of potential candidates. Targeted recruiting is done through business and community partnerships and outreach. Methods include:

- Outreach to local teacher-training colleges and universities
- Advertisements in local, state and national publications
- Career and Community Fairs
- Word-of-mouth with assistance from current employees and other community contacts

Information about CSSD’s student focus culture of accountability and professionalism is shared throughout the entire selection process.

*Hiring and Placement:* The hiring process for workforce members is outlined in Figure 5.1-2. Prospective candidates, regardless of how they are identified, complete their applications online through Edjoin. The basic application requests information such as credentials, degrees, and/or certifications; past course work and years of experience. The supplemental application includes several open-ended questions that give further insight into the applicant’s experiences, skills and objectives. Applications are screened by the Screening Team for minimum qualifications. Qualified applicants first complete a Work Styles Behavior Survey and initial assessment aligned to the job description (i.e. instructional staff take a math assessment and support staff take an office skills assessment). CSSD only advances candidates who have a low risk factor on the survey and successful pass rate on assessments. Selected applicants are invited to interview with a panel, as appropriate to the workforce segment. During the interview phase applicants are asked questions specifically designed to confirm knowledge and alignment to CSSD’s culture and VMV. CSSD is committed to hiring workforce members who are highly professional, independent, self-motivated, high-energy people who speak for themselves. Successful instructional applicants demonstrate a passion for creating a positive, challenging environment that is centered on teaching and learning. Candidates who successfully complete this phase of the process are then invited to interview

Figure 5.1-2 Hiring Process



with Senior Leaders or designee. CSSD checks references of all candidates prior to making an offer.

*Retention:* The design of the recruitment and hiring process enables CSSD to hire workforce members who fit its culture; which is the first step towards successful retention. Next, new workforce members experience an engaging onboarding process. During the first five days of employment, new employees are exposed to and trained on best practices identified through the CKMS (Figure 4.2-1). Best practices are shared through the employee shadowing process, which pairs new employees with high performing workforce members who have been identified through the OPMR (Figure 4.1-1). Work alignment between the individual employee and SI is also a key driver of retention. Recognition, favorable pay and competitive benefits also contribute to retention. For instructional staff members, the ability to work in an educational environment that has a ratio of 11 students to 1 staff member, and to participate in PPEP, is an incredibly powerful differentiator that is highly desired by great teachers. As a result of these combined factors, CSSD has retained 100% of new employees (less than 12 months) for the last three years.

**5.1a(3)** CSSD organizes and manages its workforce to accomplish its work, to focus on students, and to exceed performance expectations by focusing on its core competency of *Transforming Lives*. As a key stakeholder, workforce members

have a deep understanding of their role in *Transforming Lives* as well as aligning to the organization’s VMV and SI.

Resource center location placement is key to the ability to focus on students, their learning and ultimately...*Transform Lives*. Convenience for students combined with the positive teacher/student ratios are essential ingredients for achieving positive student outcomes and ultimately, the ability to *Transform Lives*. Teachers are placed into specific RCs and function with the support of four roving Learning Leads who are aligned to the four regions. Learning Leads report to the School Coordinator who serves as a LT member.

To exceed performance expectations, each workforce member’s performance is monitored through an individualized scorecard that is directly aligned to a SI through the LMS and deployed annually through CKMS methods. Individual performance progress and organizational learning takes place through the OPMR. Scorecard analysis and process results are inputs into the SPP to ensure CSSD systematically reinforces its student-focused culture and expectations of exceptional performance.

**5.1a(4)** CSSD prepares the workforce for changing and capability and capacity needs through processes described in 5.1a(1) and the LMS. SL regularly communicate environmental and legislative landscape changes to the entire workforce through the CKMS. SL approach the workforce through various CKMS methods for input before making decisions regarding new opportunities, such as expanding program offerings, implementing process improvements and opening new locations.

**5.1b Workforce Climate**

**5.1b(1)** CSSD’s BOD has established policies to ensure workplace health, security, and accessibility for all workforce members. A key requirement of CSSD’s workforce is to work in a safe environment. As outlined in *Figure P-3*, CSSD meets or exceeds state and federal mandates for health and safety training requirements. Through the CKMS and AU, 100 percent of workforce members are trained annually on blood-borne pathogens, child protective services processes, sexual harassment, and staff/student interaction. Safety trainings occur quarterly through CKMS Methods. Semi-annually, all workforce members participate in earthquake and evacuation drills.

CSSD maintains a Board of Directors’ approved School Safety Plan (AOS). The Plan outlines expectations and responsibilities of the Executive Safety Committee, location-specific Safety Ambassadors, and all workforce members. Safety Ambassadors are responsible for the compliance, training and implementation of the School Wide Safety Plan at their location. Safety Ambassadors champion a safe and supportive environment through training of safety strategies and maintaining safety compliance. CSSD ensures that all locations are ADA compliant, accessible and accommodate people with disabilities.

Through the OPMR CSSD monitors workforce satisfaction results on safe and supportive environments (*Result 7.3-6*). Trainings, evaluations, and safety events are tracked to identify trends that require immediate attention. Safety data is shared through the CKMS and is an input into the SPP.

**Figure 5.1-3 Workforce Benefits**

<b>Basic Benefits Package - 100% Employer paid for eligible employee and all eligible dependents</b>			
Benefits	IS	SS	LT
Medical (PPO/HMO)	x	x	x
Dental	x	x	x
Vision	x	x	x
Chiropractic	x	x	x
Basic Life/AD&D	x	x	x
Employee Assistance	x	x	x
Professional Liability	x		x
Sick Leave	x	x	x
Differential Pay (Half time pay)	x	x	x
Vacation		x	x
Retirement (STRS/PERS)	x	x	x
<b>Voluntary Benefits Package - Employee paid with discounted rate negotiated by CSSD</b>			
Benefits	IS	SS	LT
Term Life and AD&D	x	x	x
Retirement/Investment	x	x	x
Legal Assistance	x	x	x
Disability	x	x	x
FSA - Section 125	x	x	x
Long Term Care	x	x	x
American Fidelity*	x	x	x
Liberty Mutual*	x	x	x
<i>IS=Instructional Staff, SS=Support Staff, LT=Leadership Team *offer a variety of benefits at discounted rates</i>			

There are no significant differences in these measures amongst workforce members.

**5.1b (2)** CSSD supports its workforce with services, benefits, and policies that exceed those of our sponsoring district, SDUSD. The base compensation schedule is 5 percent above SDUSD and competitive with other neighboring districts. CSSD annually revisits its benefits plan to better target workforce segments and to negotiate better rates. For health and liability insurance, CSSD is self-insured through the San Diego County Office of Education. This has resulted in better coverage for its workforce at a reduced cost. CSSD’s benefits package is 100% employer paid for eligible employees and all eligible dependents. Benefits and services are outlined in *Figure 5.1-3*.

**5.2 Workforce Engagement**

**5.2a Workforce Engagement and Performance**

**5.2a(1)** CSSD fosters an organizational culture that is characterized by open communication, high performance, and engaged workforce through a continual focus on its VMV and

CC.

The CKMS (*Figure 4.2-1*) is the primary vehicle for accomplishing collaboration, open communication and knowledge sharing among all workforce members. In these regularly scheduled methods, alignment is tied directly to our CC and VMV. The CKMS supports CSSD's culture of effective communication by empowering the workforce with opportunities for sharing knowledge and best practices, providing professional development, and promoting collegiality. CKMS methods are intentionally cross collaborative among workforce segments and/or departments. CSSD has an open-door policy that encourages one-on-one discussions between members of the Instructional Staff, Support Staff, and LT.

High performance and accountability at all levels are driving elements in CSSD's culture and allows the school to live its Value of Kids Come First. The integrated scorecard system described in 4.1 is largely designed to drive high performance that is aligned across CSSD.

CSSD's culture of open and effective communication and high accountability creates an engaged workforce. The integrated scorecard system allows all workforce members to easily tie their daily work to student achievement and the overall success of the organization. CSSD's high level of workforce engagement is demonstrated through employee retention and employee effectiveness results that outperform prior Baldrige recipients and national comparisons. (*Figures 7.3-7-9*)

Many aspects of CSSD's structure encourage diverse ideas, cultures and thinking. Each CKMS method brings together workforce members from different disciplines, departments, and locations to discuss common ideas. These inter-disciplinary and cross-functional teams allow for varying perspectives and new ideas. The SPP (*Figure 2.1-2*) receives input from all stakeholders so that the SP and AP reflect a diversity of viewpoints and thoughts.

CSSD empowers its workforce to make decisions closest to students and customers through its role in the LMS (*Figure 1.1-1*). Workforce members are key stakeholders in the SPP, and their input and feedback is integrated into the key process and key support processes. Best practices and expectations are shared through the CKMS, and work progress is analyzed and monitored through the OPMR. The integration of the LMS, the CKMS, and the OPMR, allows for leadership and accountability for individual work to be at all levels.

**5.2a(2)** CSSD uses the nationally administered Hay Group survey to determine the key drivers of workforce engagement. CSSD adopted Hay's key drivers of employee outcomes to guide and benchmark employee effectiveness and engagement. CSSD determines engagement drivers for different workforce groups and segments by actively seeking input from Hay Group, SHRM, the BOD, workforce segments, and key stakeholders.

**5.2a(3)** CSSD assesses workforce engagement through a systematic process utilizing multiple approaches including the use of formal surveys such as the Employee Satisfaction and Engagement Survey, Ethics Survey, and CSSD Support Staff Survey and through the annual formal scorecard review process. Informal methods include periodic individual scorecard reviews

and individual meetings encouraged through the open-door policy embraced by all LT members.

At CSSD, the methods and measures for employee engagement and empowerment do not differ across workforce segments based on workforce member requirements gathered through key listening methods. Key engagement and empowerment drivers are: clear and promising direction, quality and customer focus, confidence in leaders, respect and recognition, development opportunities, pay and benefits, performance management, authority and empowerment, resources, training, collaboration; and work, structure, and process. Strong employee engagement and empowerment leads to high employee performance, strong customer satisfaction, and financial success.

Workforce retention, absenteeism, complaint, safety, and productivity data is systematically gathered and tracked to assess workforce engagement. Results are analyzed and shared at quarterly LT meetings and at the department level, as needed. The results are also cross-referenced with workforce survey results. If trends are established, the HR Department schedules meetings with individual workforce members to further support the member, and AP are developed to re-engage the workforce member, if needed.

**5.2a(4)** CSSD's performance management process, the OPMR (*Figure 4.1-1*), supports high performance and workforce engagement by identifying individual workforce members who demonstrate best practices and high performance. Through CKMS methods, the identified workforce members are rewarded and recognized. They are identified based on scorecard results that demonstrate best practices and their high level of engagement. If a decrease in performance or engagement is identified, job shadowing opportunities and specific trainings are provided through multiple CKMS methods, including individual meetings.

Since CSSD expects high performance and engagement from all workforce members, compensation levels are deliberately set above the authorizing district. The workforce is paid 5 percent above SDUSD salary schedule and is competitive with neighboring districts. High performing, engaged workforce members who meet or exceed target goals are publicly recognized on an annual basis. Other recognition activities include award luncheons, leadership opportunities and awards. SL also recognize individual workforce members through methods addressed in the SL Communication Plan (*Figure 1.1-2*).

CSSD was built on innovation. CSSD encourages intelligent risk taking to achieve innovation and agility from every member of the workforce. Intelligent risk taking to achieve innovation is integrated into key CKMS methods to identify new practices and ideas. These practices and innovations are developed through the PDIS and are integrated back through the CKMS methods.

Students, other customers and student learning are reinforced through the OPMR. Key measures relate to increased student learning. Scorecard AP are monitored through the OPMR to ensure progress and achievement.



# 6 OPERATIONS

## 5.2b Workforce and Leader Development

**5.2b(1)** CSSD's Workforce Learning and Development System (WLDS) (*Figure 5.1-1*) carefully addresses the organization's needs and the personal development of workforce members, managers, and leaders. The WLDS first considers SP inputs and workforce Capability and Capacity Assessments that filter into each workforce member's placement and the creation of personalized professional development plans that are delivered through Altus University (AU). AU is CSSD's comprehensive professional development plan that is offered to all employee segments.

Learning and development desires and needs of all workforce members are identified through regular scorecard reviews, as well as through CKMS methods and one-on-one conversations. The needs and desires for training and development of the entire workforce are discussed, analyzed and evaluated through CKMS methods and the OPMR process. Plans for new training and development approaches are created based on CC, strategic challenges, and requirements of AP. During the SPP, CSSD considers training and development needs based on organizational performance improvement, technological change, innovation, and the Capability and Capacity Assessment of current staff.

CSSD's ethical practices are fully deployed to all workforce segments through the New Employee Orientation and are reinforced through ongoing professional development. Ethical standards are clearly defined and written in the Employee Manual. Each workforce member also signs a Code of Ethics document annually (*Figures 1.2-3, 7.4-7*).

A focus on students and other customers is built into the WLDS. During the recruitment and hiring process, CSSD's culture of Kids Come First and high accountability are clearly articulated. This culture is reinforced during new employee training and through AU professional development trainings. AU trainings are based on student achievement data, California state mandates, federal regulations and mandates, and best practices. (Full AU offerings AOS)

CSSD takes a systematic approach to the transfer of knowledge among faculty and staff. Veteran Teacher Training (VTT) is offered three times a year through AU. The main goal of VTT is for veteran teachers to remain current on innovations in education and to share best practices with colleagues. All CSSD workforce members cross-train and share knowledge, best practices and lessons learned through the CKMS. These approaches help ensure the transfer of knowledge from departing or retiring workforce members to current and new members.

To ensure reinforcement of new knowledge and skills, training and development are created to meet the needs of all workforce segments. After training and development sessions, workforce members complete evaluations to measure the effectiveness of the training. Results are monitored through the OPMR, and adjustments are made as needed.

**5.2b(2)** CSSD evaluates the effectiveness and efficiency of the WLDS through the OPMR process. Inputs include survey results, student achievement results, workforce retention, workforce engagement and satisfaction levels, AU evaluations, and SI progress and achievement. CSSD holds that increased

workforce engagement will yield increased organizational results in PPEP and key support processes.

Correlations between workforce engagement and organizational results are analyzed by LT at quarterly LT meetings and through the SPP to identify opportunities for improvement in both workforce engagement and learning and development offerings. Once opportunities are identified, they are developed through the PDIS. AP are developed, and benchmarks are identified.

**5.2b(3)** CSSD offers career progression at every level. CSSD manages its organizational career progression through the OPMR's analysis. Formally, career development for workforce members is managed through the individual scorecard review with supervisors and mentors annually. Through this meeting, growth opportunities are discussed in regard to their current position and potential advancement in the organization. This process empowers workforce members to take the initiative in developing their careers. By collaborating with supervisors to receive support needed, workforce members work to meet their career progression goals. Informal opportunities for growth are provided throughout the year. Opportunities include attendance at AU sessions, AU trainer opportunities, external conferences/trainings, and individual mentoring.

In 2008, CSSD's CEO established Executive Studies to manage career progression for workforce members who were identified for future leadership. In 2013, through a cycle of refinement and as the organization grew, Executive Studies sessions were integrated into AU and were opened up to all workforce members interested in leadership and career progression. This career progression management process has been incredibly successful. Nine out of the 13 current LT members progressed from instructional or support staff positions, and 53 percent of certificated staff members began as RCAs.

CSSD carries out succession planning for management and leadership positions seeking input from the BOD, the CEO Council, and appropriate LT members. From these inputs SL enhanced the Executive Studies to incorporate LT development meetings and external development opportunities such as the Baldrige National Conference and statewide charter meetings and conferences. Identified workforce members are given leadership and project management opportunities to develop the necessary skills to become a future leader.

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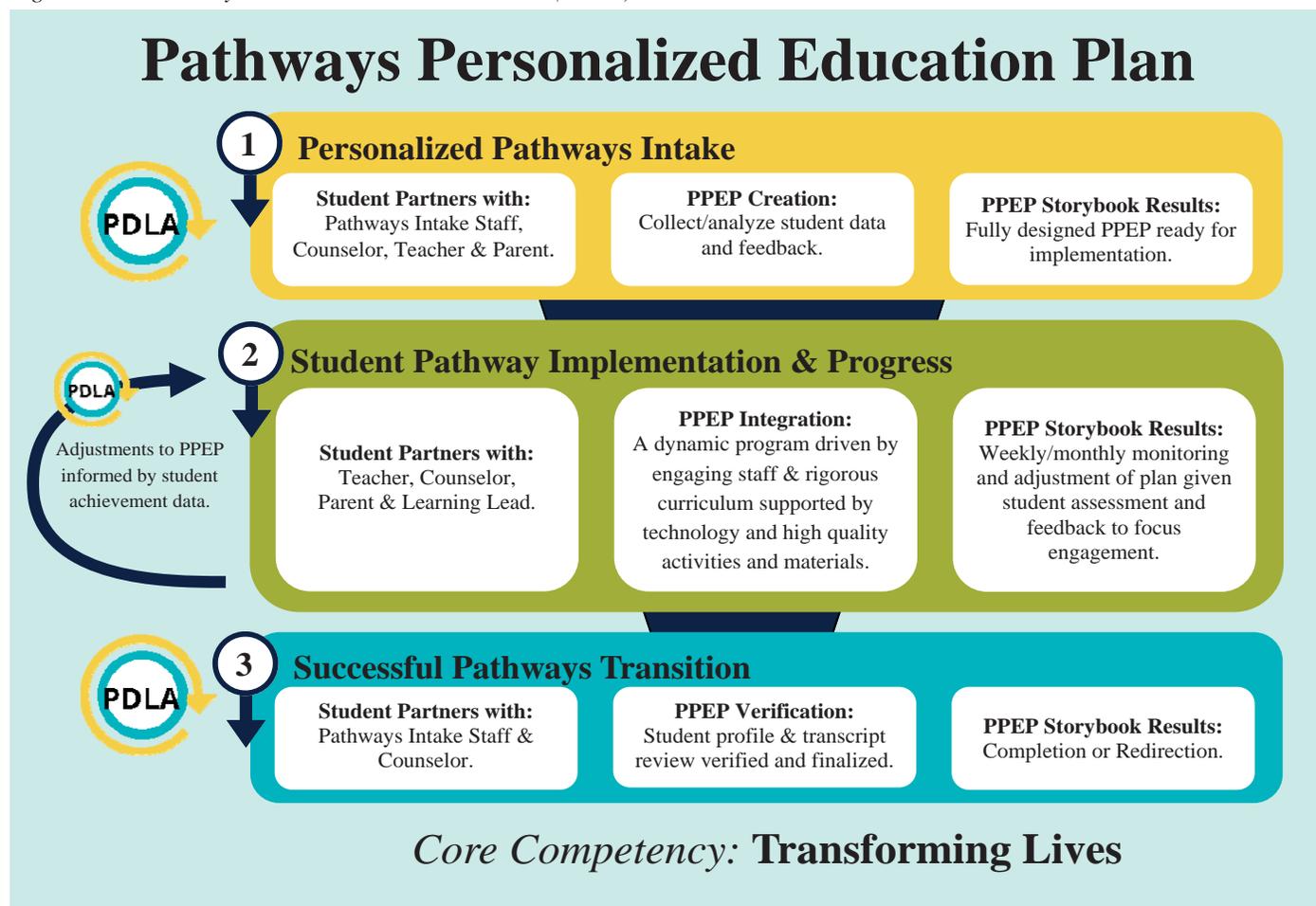
## CATEGORY 6: Operations

### 6.1 Work Processes

#### 6.1a Program, Service, and Process Design

**6.1a(1)** CSSD determines its key educational program, service and work process requirements by remaining focused on its Core Competency of *Transforming Lives*. To accomplish its Core Competency, CSSD SL and LT members review federal and state regulatory requirements, key customer and stakeholder requirements, and competitor student achievement and customer satisfaction data as inputs to the SPP. SI, Goal, and AP are created to exceed key customer and stakeholder expectations. Progress is monitored through the OPMR so that appropriate

Figure 6.1-1 Pathways Personalized Education Plan (PPEP)



adjustments can be made through the CKMS.

The PPEP is CSSD’s Key Work Process. The PPEP is specifically designed to engage students in their education and to help them advance academically through an individualized academic plan, which is a key customer requirement. It is broken into three phases.

*Personalized Pathways Intake:* Once a student and parent contact CSSD to initiate the enrollment process, a Pathways Intake is scheduled within two to four business days. This meeting begins the student’s PPEP creation. The development of the PPEP begins during the student’s and parents’ initial meeting with CSSD, which takes place at one of CSSD’s Student Services Centers (SSC). The conveniently located SSCs are carefully designed to introduce new students and families to CSSD’s welcoming, student-centered, customer service oriented culture. Students and families immediately meet with their designated SSC support staff member who is responsible for guiding the students and parents in completing the enrollment process. The Pathways Intake process begins when the designated support staff member presents the students and parents with program and cultural highlights. The support staff member then gathers the student’s transcripts, discipline history, immunization records, test scores, student’s housing information (homeless, foster youth), contact information, and socio-economic/demographic information.

The support staff member then begins the process of

personalizing the student’s individualized academic plan by collecting and analyzing information that helps guide specific student requirements and needs. This type of information includes whether the student is pregnant or parenting, an EL, or has an active IEP or GATE plan. The SSC staff member also inquires if the student has specific health concerns to determine if resources or accommodations are needed and if the student has access to a computer or internet at home. The SSC support staff member explains and administers the MAP Intake assessment, which measures the student’s current academic skill levels in Math and English Language Arts. While students are taking the Intake assessment, parents complete the SSC Customer Service survey to give valuable feedback on the Intake process.

The student information that is collected during the Intake process is entered into the SIS by the designated SSC support staff member the same day as the student’s Intake to create the student’s dashboard. The student’s dashboard is then staff associated to a designated counselor. Within 24 hours, the counselor reviews the student’s SIS file and completes a transcript review and credit audit to create the student’s course plan. The credit audit and course plan are added to the information collected during Intake and saved to the student’s dashboard. The counselor staff associates the student’s dashboard to a teacher selected based on information provided on the student’s RC Location Preference Questionnaire and the organization’s Capability and Capacity Assessment. Because CSSD’s SIS is web-based, information is

transferred to the teacher in real time.

The HQ teacher has the ability to review the student’s dashboard immediately and is expected to contact the family within 24 hours to schedule a RC orientation meeting. This is the final meeting of the PPEP planning intake. During this meeting, the student, parents and the teacher first sign a Master Agreement. The Master Agreement is a state-required compliance form for all IS schools that outlines the agreement between the student, parent and CSSD. The agreement includes the academic term, academic objectives, courses, methods of study and the HQ teacher assignment. Students, parents, and teachers then agree on expectations of behavior, and the first course is issued. Before the student leaves the RC, he/she completes a Naviance Game Plan Survey that assists the student in establishing a post-high school Pathway. Naviance is a comprehensive college and career readiness solution for middle and high schools that helps align students’ strengths and interest to post-secondary goals and improve student outcomes.

The teacher considers inputs from the student’s Intake process, their academic needs, and the skills and interests highlighted through Naviance to assign and develop personalized courses that are delivered through a blended, online independent study educational program. Teachers also work closely with the family to individualize a convenient schedule, to set specific personal and academic goals and to align resources so that the student leaves CSSD college and career ready. Students’ outline their preference to graduate with CSSD or to catch up academically

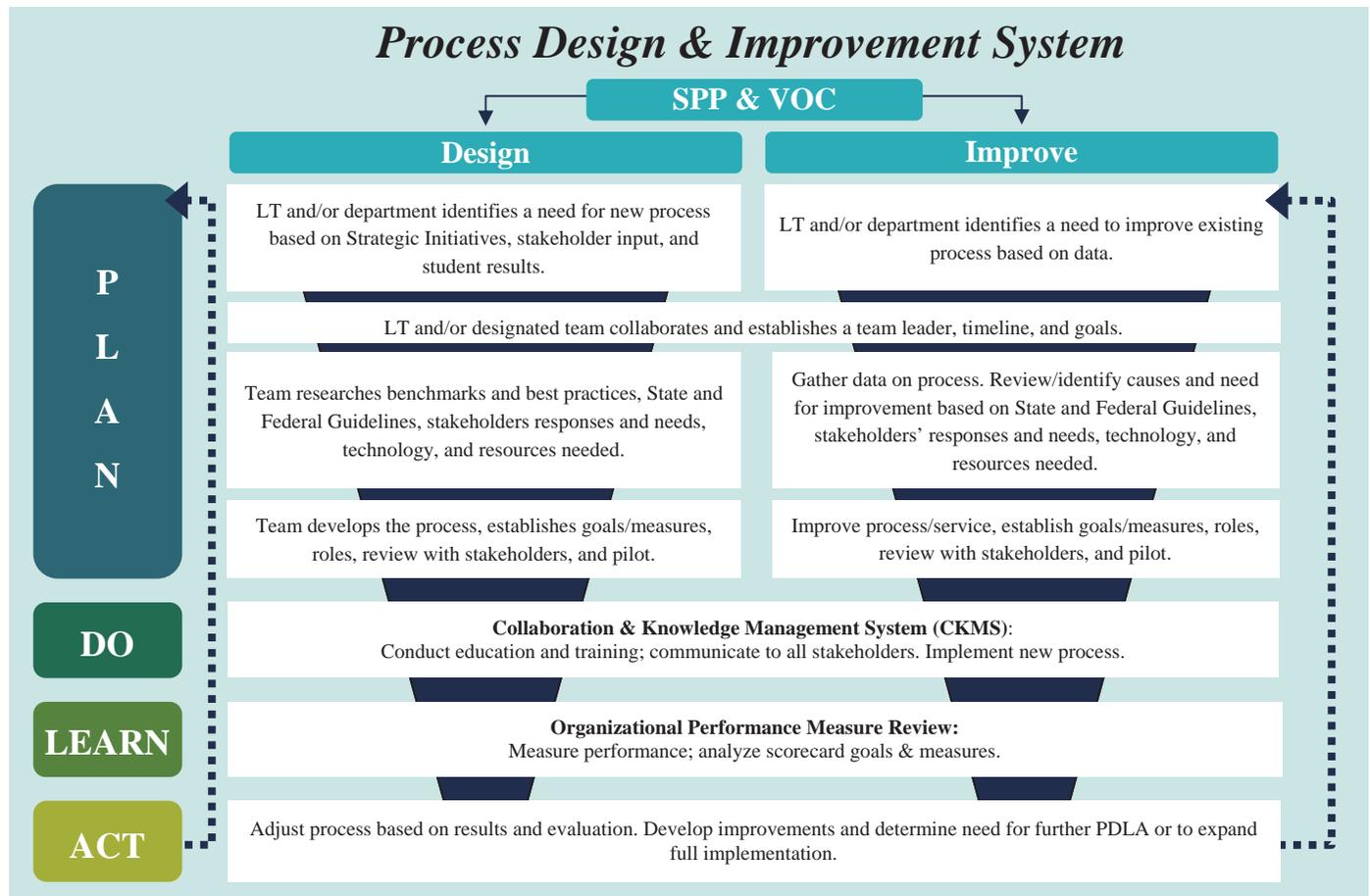
and to be redirected to their traditional high school to graduate.

*Student Pathways Implementation and Progress:* During the second phase of the PPEP, students and parents, as appropriate, work daily and weekly with their HQ teacher in a one-on-one and small group setting at their neighborhood CSSD RC. Students are immediately engaged with a rigorous, technology-enhanced curriculum that is customized to meet their specific academic needs given information from Step 1 of the PPEP.

Students take one to two courses at a time, allowing them to focus on mastering the standards of one course before moving onto the next. Teachers utilize a variety of instructional modes of delivery to target student engagement and increase achievement. Online, blended, independent study and one-on-one tutoring enhance a range of student learning styles and pathways. In addition, each student’s PPEP is enhanced with field trips, volunteer opportunities, cultural events, guest speakers, career days, a wide variety of elective course options, and work experience customized to student interest and pathway choice.

To ensure the instructional strategies and engagement activities are providing a successful path for individual students, a variety of data is integrated into the PPEP. Teachers use instructional software tools such as Naviance, CSSD’s college and career software. Teachers also utilize MAP assessment software and School Pathways SIS to view real time student achievement data. Naviance, MAP and SIS data is integrated into the PPEP Storybook. The PPEP Storybook data is reviewed

Figure 6.1-2 Process Design and Improvement System (PDIS)



and analyzed by teachers, Learning Leads and the School Coordinator to ensure that the instructional strategies used are truly successful for each student. Based on the PPEP data, teachers can immediately reconcile and adjust the student’s instruction, methods of delivery and resources. Because CSSD has purposely designed its program so that teachers work with only 40 students, teachers are able to communicate frequently with the family and get to know each student’s academic strengths and social needs. The largest differentiator for CSSD’s program is the ability to go well beyond traditional methods to transform the lives of the kids. Teachers and staff conduct home visits, perform and track appropriate interventions, and refer students and families to specific community resources and partnerships.

An example occurred while the Baldrige team was writing this application. A student in the nearby RC reported to staff that they were planning to hurt themselves immediately if medical attention was not given. The teacher was very familiar with the student’s medical and emotional history given the design of the PPEP. Knowing the student was bipolar and struggling with

sexual identity and family support, members of the Baldrige writing team immediately left the room to assist the student. The appropriate authorities and community resources were gathered immediately. The student was able to receive the help needed. At a traditional school setting, this type of comfort level, immediate attention and action probably would not have occurred.

CSSD is widely recognized by communities served as a role model for providing the highest quality of individualized instruction and outstanding customer service. In 2014, CSSD sought and received the highly coveted National Project AWARE Grant. Grant funds are used to conduct National Youth Mental Health First Aid trainings for professionals that interact with school-aged youth within San Diego County. CSSD is the only school in San Diego to be awarded this grant and will successfully train its entire Instructional Staff on effective strategies for working with Youth Mental Health issues.

*Successful Pathways Transition:* During phase three of the PPEP, students are either redirected or they graduate based on the accomplishment of their PPEP goals. All students complete an exit survey to identify best practices and opportunities for improvement. These results act as an input into the SPP as outlined in the LMS.

Requirements for the key work process, the PPEP, are measures that relate to the student Intake, personalized instruction, data informing instruction and curriculum, and the student’s redirection or completion.

**6.1a(2)** CSSD designs its educational programs and services and the PPEP through the PDIS (*Figure 6.1-2*).

**6.1b Process Management**

**6.1b(1)** CSSD’s day-to-day operation of work processes is based on the key customer requirements that are reviewed annually as a key step of the SPP. Key Customer and Stakeholder feedback is analyzed for trends and is an input into the SPP. This data drives the PPEP and all organizational work processes, as referenced in *Figure P-5*.

*Figure 6.1-3* outlines the key performance measures and indicators and in-process measures to control and improve CSSD’s work process.

These measures relate to the quality of outcomes and the performance of CSSD’s educational programs and services by providing data that aligns to the Core Competency of Transforming Lives. To transform lives, the two key outcomes vital to measuring CSSD’s success is CSSD’s ability to either redirect or graduate students. All process measures represented in *Figure 6.1-3* support this ultimate goal. Progress is tracked through the OPMR. For example, the ability of CSSD to quickly perform the Intake Cycle time enhances the ability to quickly engage the student who, for the most part, is coming from a relatively negative perspective of their education. CSSD’s ability to quickly immerse them into a new and intensely supportive environment enhances our ability to engage the student into having hope for their education and success. As indicated in *Figures 7.1-1-9* CSSD’s dropout and graduation rates outperform competitors and are fulfilling the requirements as established by key customer and stakeholders as seen in *Figure P.1-5*.

**Figure 6.1-3 Key Process Requirements and Measures**

		Requirements	Process Measure	Results	
		Key Customer/Stakeholder Requirements and Expectations	Strategic Planning Process	Pathways Personalized Education Plan	Pathways Intake
Increase SSC Customer Service Survey Results	Figure 7.2-15				
Increase Enrollment Data	Figure 7.5-6				
Personalized Instruction	Increase NWEA MAP Growth		Figures 7.1-19-21		
	Maintain Student Retention Rates		Figure 7.1-30		
	Increase Student/Parent Satisfaction Results		Figures 7.2-1-18		
	Increase Student Participation Rates		Figure 7.1-10		
	Increase Student Confidence Survey		Figures 7.1-23-29		
	Data Informing Instruction/ Curriculum		Increase CAHSEE Pass rate	Figures 7.1-11-18	
Increase Teacher Audit Results		Figure 7.1-33			
Redirect or Complete	Increase Graduation Rate	Figures 7.1-5-9			
	Decrease Drop Out Rate	Figures 7.1-1-4			
	Increase Successful Transition Rate	Figure 7.1-22			

**6.1b(2)** SL and appropriate LT members determine CSSD’s key support processes primarily based on the key customer and stakeholder requirements as outlined in *Figure P-5*. Regulatory requirements, Capability and Capacity Assessment results, and VOC data are additional inputs into the determination process.

CSSD’s 10 key support processes are Data and Assessment, Curriculum, Professional Development, Communications, Fiscal Services, Technology, Human Resources, Safety, Operations, and Ethical and Societal Responsibility. Each LT member who owns the Key Support Process reports quarterly on scorecard progress at the LT meeting. Progress is monitored monthly through the OPMR. All data as it relates to SI, Goals and AP are reviewed and analyzed to act as inputs into the SPP. This demonstrates alignment with three of CSSD’s Basic Values: Kids Come First, High Accountability, and Business Principles.

**6.1b(3)** CSSD improves work processes to increase student learning, improve educational programs and services and performance, and enhance its Core Competency through the PDIS (*Figure 6.1-2*). CSSD reduces variability through the L phase of the PDLA process, which is embedded in the PDIS. Once variability is identified during the L phase, communication and training occur through the CKMS to reduce it. Through the OPMR, data is analyzed and shared to monitor variability. Adjustments are made as needed.

**6.1c Innovation Management** CSSD pursues strategic opportunities by considering internal and external factors that influence success. Once an idea or opportunity is received through the listening methods, SL determine alignment to the VMV, SI, and the CC. A champion is identified based on his/her capability and capacity. Research is conducted and data is gathered through the PDIS. SL consider the data to determine if financial and other resources should be made available to support the idea or opportunity. Specific measures are identified to test the viability of the process.

Financial and other resources are made available to support innovation and risk taking through effective financial management. Examples are responsible cash flow management, budget controls, revenue enhancement and expenditure controls. Additionally, as described further in *Figure 7.5-1*, maintenance of reserve accounts is a key component to financing innovation. Three reserve funds are available and the one targeted to support innovation is the Contingency/Strategic Fund. The CBO oversees the entire fiscal process and advises the SL and LT on how to best resource innovation.

Decisions to discontinue pursuing an opportunity are accomplished through the L and A phases of the PDLA as part of the PDIS process. The L phase includes the analysis conducted by the LT through the review of the measures identified as part of the test phase. During the A phase, “Go” or “No Go” decisions are made based on this analysis of the balance of resources as opposed to the contributing value of the opportunity.

**6.2 Operational Effectiveness**

**6.2a Process Efficiency and Effectiveness** At the highest level, CSSD’s CBO controls overall costs by closely monitoring all

*Figure 6.1-4 Key Support Processes and Measures*

Key Customer/Stakeholder Requirements and Expectations	Strategic Initiative	Key Support Processes		Key Measure
		Data and Assessment	PPEP Storybook; Regulatory Reporting	
	Curriculum		UC a-g Approval; NCAA Approval; Edgenuity Courses; Online Textbook Offerings	
	Professional Development		Training Hours; LEC Trained Teachers	
	Communications		Social Media and Web-based Engagement	
	Fiscal Services		SB 740 Compliance; Budgetary and Financial Performance	
	Technology		IT System Uptime; Student Computer Ratio	
	Human Resources		Retention; Vacancy Rates; Workforce Survey Results; HQ Teacher %; Student/Staff Ratio; Advanced Degrees	
	Safety		Emergency Preparedness; Workers Comp Claims	
	Operations		Permits Obtained	
	Ethical and Societal Responsibility		WASC, BOD, Ethics survey, Renewal, Audits	

financial activities and leading indicators, such as enrollment and ADA compliance, on a monthly basis. Results of the CBO’s analysis are shared at the Sustainability meeting. All workforce members share responsibility for financial stewardship and operational effectiveness through the OPMR.

CSSD’s key work and support processes incorporate cycle time, productivity and efficiency and effectiveness of factors through the implementation of individual scorecards that are monitored through the OPMR and are inputs into the SPP. Outcomes often indicate what areas need attention to develop trainings to prevent error and rework. Specific trainings are developed and delivered through the CKMS. Their effectiveness is reviewed through the OPMR on a weekly, monthly, and annual basis.

An example is the teacher training that was implemented in May 2015. In the fall of 2014, CSSD’s School Coordinator, in collaboration with Learning Leads, identified training deficiencies for seasonal teachers based on scorecard reviews.

*Figure 6.2-1 Supply Chain Management*

Suppliers	Key Measure
Southland Technology Incorporated (Key IT Provider)	Core Server Uptime Figure 7.1-38
School Pathways (Student Information System and Teacher Effectiveness Tool)	Teacher Audit Results Figure 7.1-33
Edgenuity (Online Curriculum Provider)	Course Taken Figure 7.1-37
JPA/FBC (Benefits and Risk Managements)	Workers Comp Figure 7.3-5

# 7 RESULTS



During the summer months, CSSD hires a significant number of teachers to accommodate a seasonal spike in enrollment. This analysis resulted in an adjustment to new teacher training for seasonal teachers. In the past teachers were trained at their individual RCs on all aspects of the organization. Beginning in May 2015, seasonal teachers' training was streamlined to include a week of intensive trainings that relate to all aspects of CSSD's teachers' jobs. This training is in addition to the 5-day new teacher training that occurs at the RC. The benefit of this adjustment is to deliver time efficiency and consistent messaging.

**6.2b Supply-Chain Management** Supply chain is managed by identifying key supplier roles in CSSD's work systems.

To ensure suppliers and vendors are qualified and positioned to enhance performance and students' and other customers' satisfaction, LT members identify a vendor/product selection team. The team consists of a LT champion and representative users to ensure broad and diverse input on the selection process. The team defines the product/services and its requirements with input from relevant stakeholders. A detailed Request for Proposal (RFP) is developed by the CBO and selection team that outlines the final requirements. The RFP is released to identified vendors who are invited to submit proposals. The team reviews submitted proposals to select the most qualified vendors. These vendors are asked to participate in an in-person interview to further determine their alignment to the RFP requirements and the organization's VMV/CC. Before a selection is finalized, the CBO is involved in contract terms and pricing negotiations.

Vendor performance is reviewed monthly by the LT champion and key users to ensure measures relating to achieving SI are being met. Feedback is collected through CKMS methods. Gathered data is analyzed for trends and reviewed through the OPMR process. The outcome is communicated to the vendor at regularly scheduled monthly meetings, or as needed, for continuous improvement.

If a vendor is performing poorly, AP progression is closely monitored by the LT champion. Specific improvement targets are set to address concerns and to clarify expectations. If improvement is not seen, the vendor is notified that a new RFP will be released.

### **6.2c Safety and Emergency Preparedness**

**6.2c(1)** Providing a safe operating environment is especially critical to CSSD because RCs and office buildings are located over a broad geographic area. In addition, one of CSSD's key customer and workforce requirements is to provide a safe and supportive environment. CSSD maintains a detailed, BOD-approved Safety Plan (AOS) that outlines the procedures for responding to a comprehensive list of safety incidents, including accidents and disasters. All workforce members are trained on the safety plan monthly, quarterly, and annually through the CKMS. Feedback on plan effectiveness is provided through the Safety Plan Implementation Team that includes a Safety Ambassador from each location. Additional input is obtained through post-drill reports and through appropriate CKMS methods such as RC and Instructional meetings. The CSSD Executive Safety Committee reviews the feedback and the Safety Plan twice a

year to look for trends and to perform root-cause analysis of failures. Adjustments are made as needed. Annual safety data is an input into the SPP.

**6.2c(2)** CSSD's comprehensive Safety Plan details disaster and emergency response plans. All workforce members are specifically trained on these responses on an annual basis. Updates to the plan are communicated to resource center and office building locations through the Safety Ambassador. A copy of the plan and these procedures, along with a safety kit, are available at each resource center. Components of the plan and training include:

RC Notification System (fire, earthquake, lockdown, shelter-in-place, all-clear)

- Evacuation of Students/Emergency Assembly
- Radio Communications
- Reunion Procedures
- Sweep and Rescue
- Security
- First Aid and CPR
- Blood Borne Pathogens and Hazmat
- Fire Extinguisher Use
- Emergency Plan Roles

Emergencies are classified as:

- Level 1: Natural Disaster/Neighborhood Crisis
- Level 2: Single/Multiple RC Immediate, Life Threatening or Critical Urgency
- Level 3: RC Specific

Specific plans and procedures to meet each of these types of emergencies have been developed. Drills are scheduled two times a year and conducted unannounced school-wide to test the readiness and effectiveness of the plan. Emergency plans for IT support are outlined in 4.2b(5).

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## **Category 7: Results**

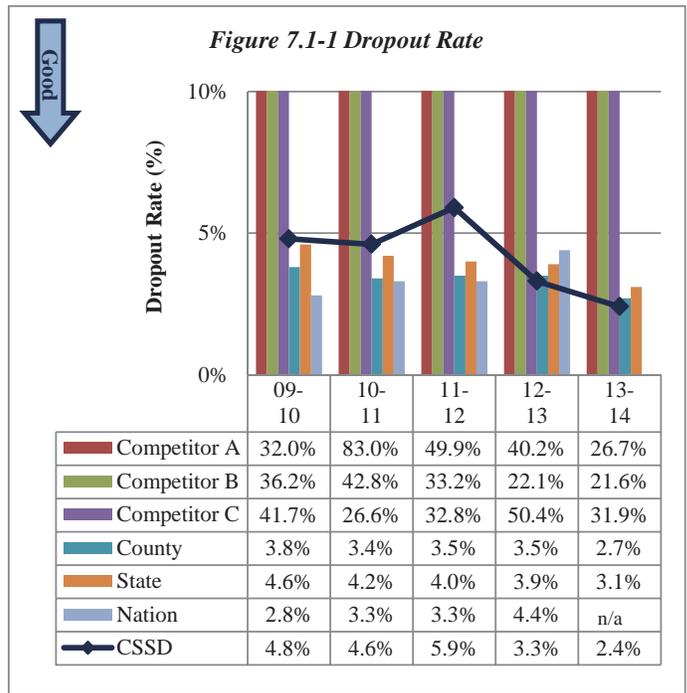
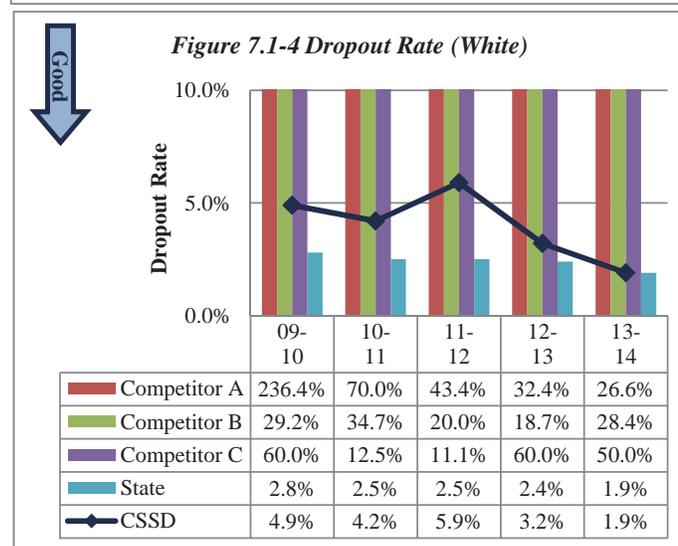
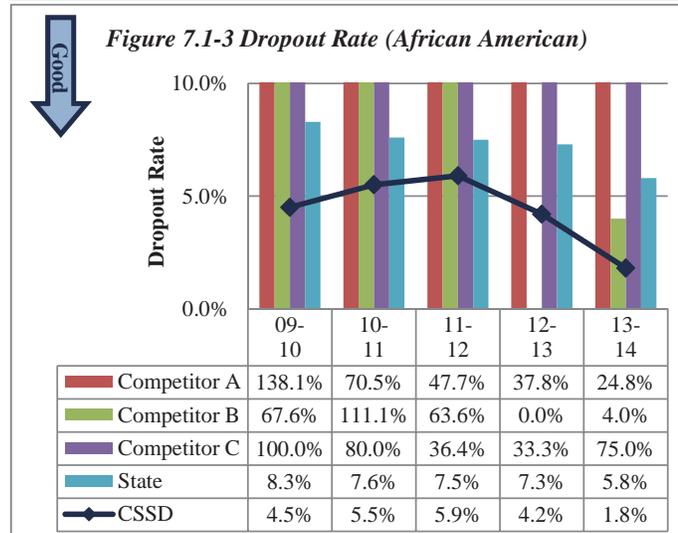
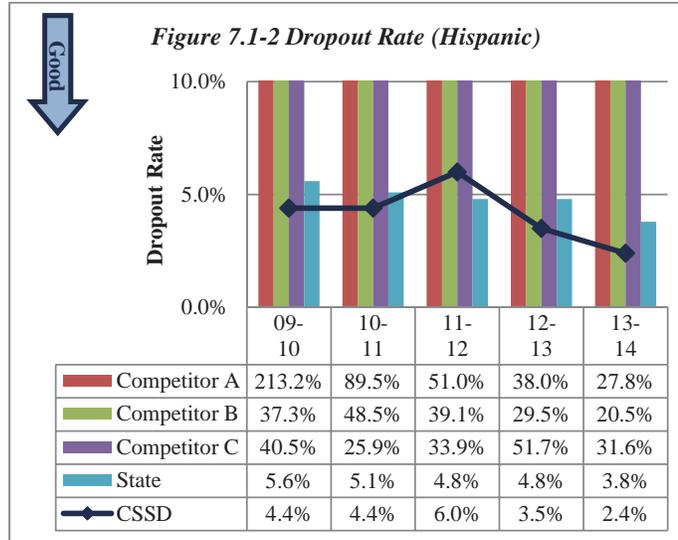
### **7.1 Student Learning and Process Results**

#### **7.1a Student Learning & Customer-Focused Service Results**

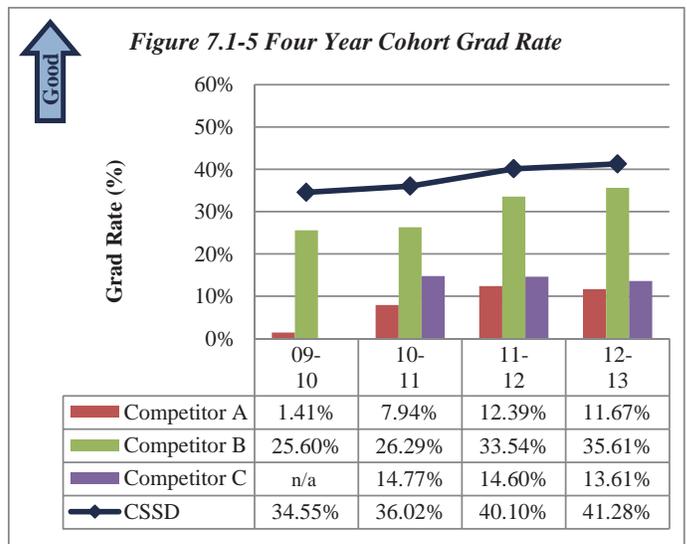
**7.1a** CSSD is a national role model school for designing and operating an instructional program that moves students from potential dropouts to high school graduates. It is one of the nation's oldest charter schools and has transformed the lives of more than 35,000 students. These results are attributed to the work of its extraordinary staff and their implementation of the PPEP. Results in Category 7 are presented and numbered in figures and paragraphs.

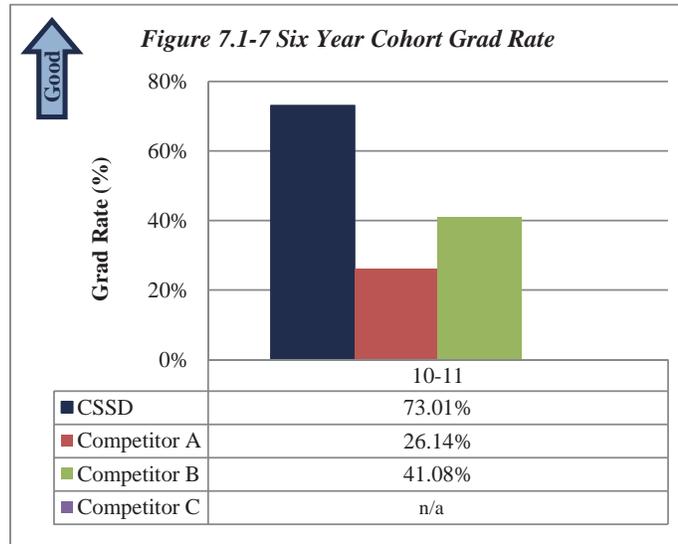
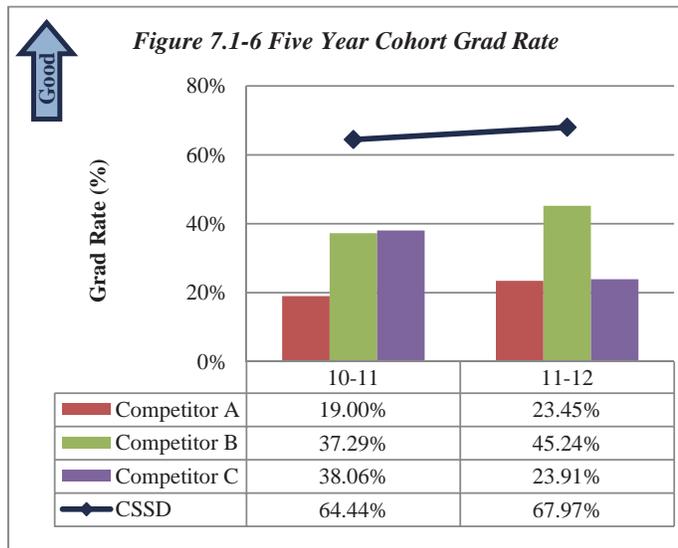
As a school with more than 70% of its student population falling into several high-risk potential dropout categories, CSSD is thrilled to have one of the lowest dropout rates in the nation when compared to its competitors, the state and the nation. In fact, CSSD not only has a significantly lower dropout rate than its three main competitors, which are also ASAM schools, but it had a lower dropout than both the state and nation in the last two years (*Figure 7.1-1*). Please note that state and national data includes all schools, not just ASAM schools, which makes CSSD's results even more significant. CSSD's current dropout rate is 2.4% compared to the state dropout rate of 3.1% (current national rate not yet available from the National Center for Education Statistics). In the previous school year, CSSD's dropout

rate of 3.3% outperformed the state’s rate of 3.9% and the national rate at 4.4%. This is a remarkable achievement given the average student enrolls at CSSD two to three grade levels behind in ELA, three to four grade levels behind in math, and/or one or more semester(s) behind in credits. Additionally, their average confidence level in school is in *Figure 7.1-23*. In addition, CSSD outperforms its competitors in all segmented student subgroups for dropouts consistently over the last 5 years (*Figures 7.1-2-4*).



CSSD systematically collects, reviews, and analyzes a variety of data points through its CKMS and OPMR processes that are relevant for the population it serves. As a non-traditional school (ASAM), with many of its students beginning enrollment behind (not on track to graduate in 4 years), CSSD not only looks at the state published results for 4-year Cohort Graduation Rate (*Figure 7.1-5*), but more relevantly the 5-year Cohort Graduation Rate (*Figure 7.1-6*), and the 6-year Cohort Graduation Rates (*Figure 7.1-7*). Because most students enrolling at CSSD are not on track to complete high school in 4 years, CSSD gives more value to the 5-Year and 6-Year Cohort Graduation Rates when comparing against its competitors to measure the success of the instructional program. This state data is always behind a year in publishing because the state allows all schools a year to reconcile their records and locate their students. Overall, CSSD outperforms its competitors each of the last several years in all three cohort graduation calculations and all student segmentations (*Figures 7.1-8-9*).





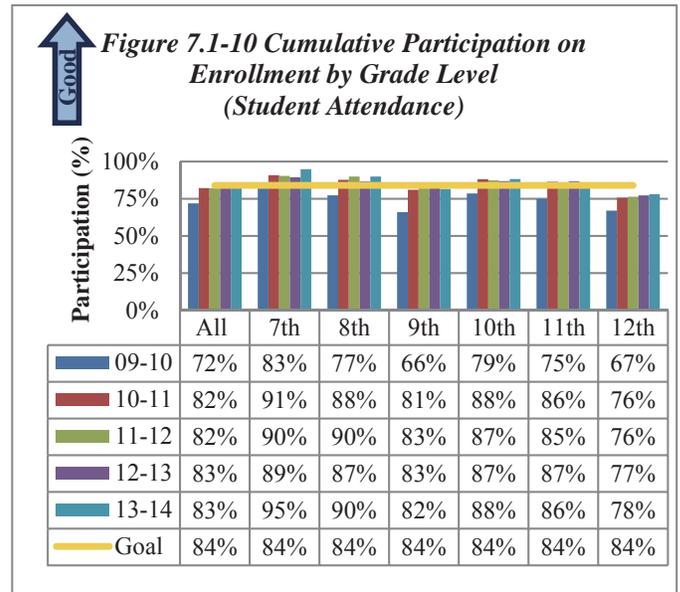
**Figure 7.1-8 Four Year Cohort Grad Rate (Significant Subgroup)**

Hispanic					
	09-10	10-11	11-12	12-13	13-14
CSSD	26.61%	26.53%	35.29%	36.09%	TBD
Competitor A	0.00%	6.99%	10.63%	12.13%	TBD
Competitor B	22.01%	20.88%	26.74%	30.91%	TBD
Competitor C	18.26%	15.44%	12.80%	12.73%	TBD
Socioeconomically Disadvantaged					
	09-10	10-11	11-12	12-13	13-14
CSSD	29.17%	32.58%	35.71%	37.48%	TBD
Competitor A	1.50%	5.83%	11.18%	10.76%	TBD
Competitor B	24.43%	22.46%	27.13%	26.63%	TBD
Competitor C	15.15%	15.75%	15.50%	14.47%	TBD

One of the key measures of student outcomes is participation (Figure 7.1-10). Participation is CSSD's measurement of student attendance. Unlike at a traditional school or seat-based charter school where attendance is measured on the number of hours a student is present at school, CSSD measures attendance by the work product produced by students as they work toward credit or course completion. Over the past five years, CSSD's par-

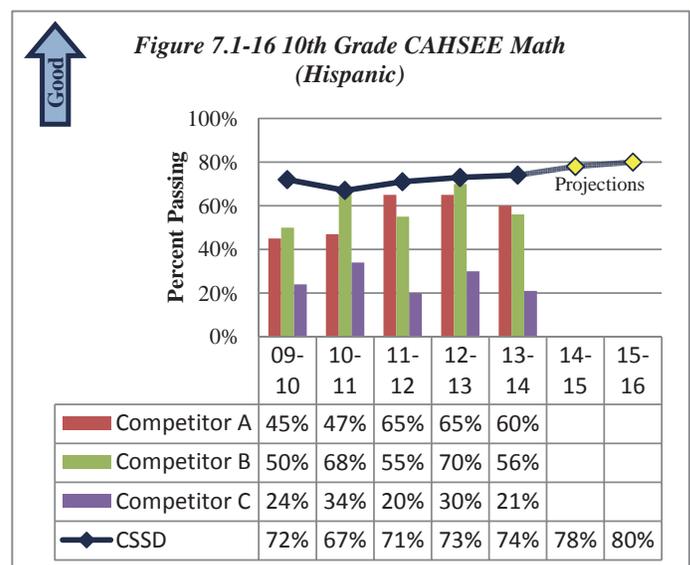
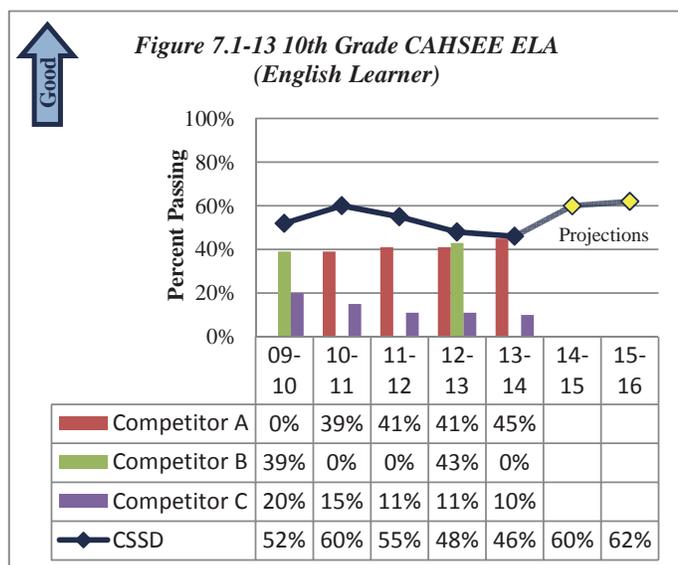
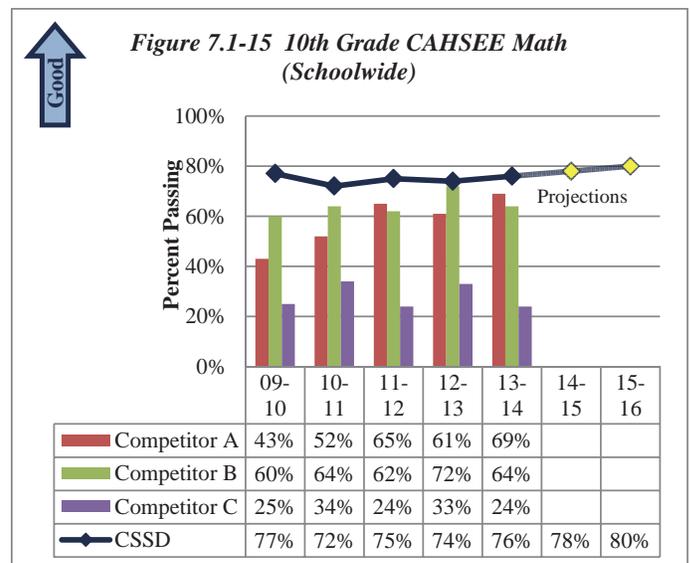
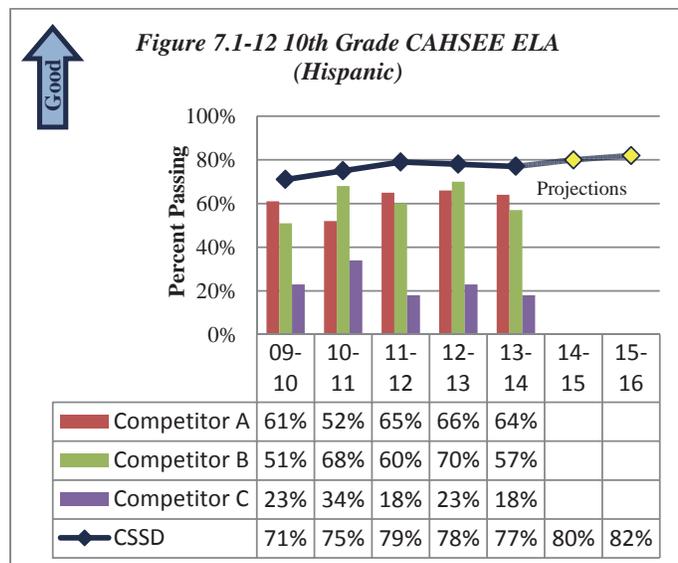
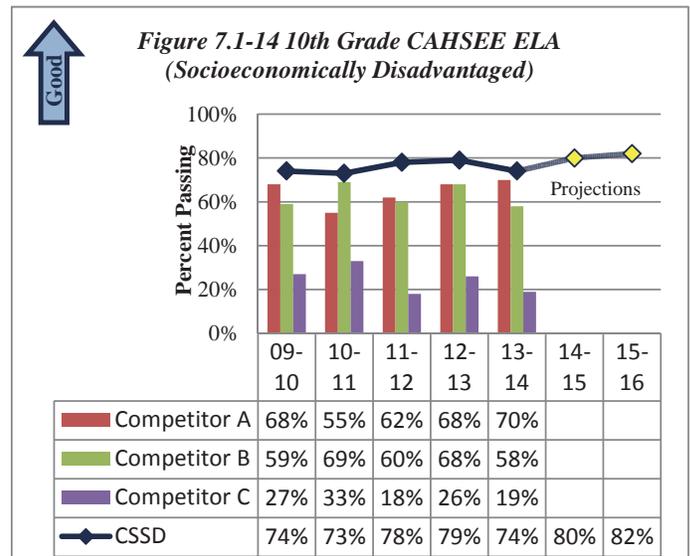
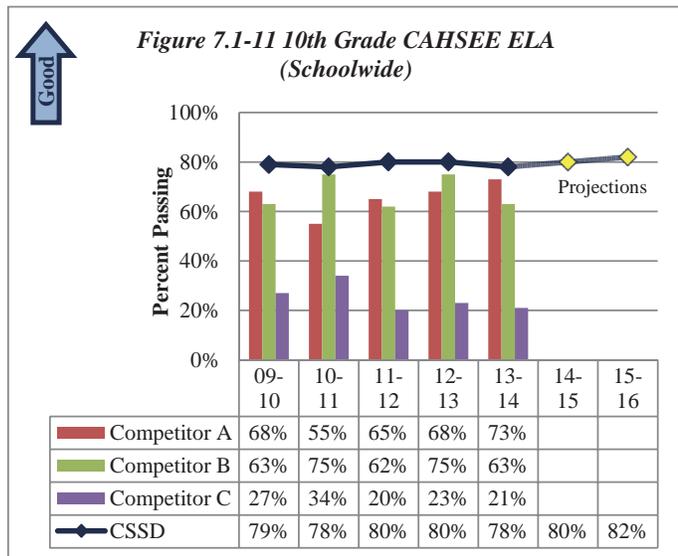
**Figure 7.1-9 Five Year Cohort Grad Rate (Significant Subgroup)**

Hispanic			
	10-11	11-12	12-13
CSSD	60.40%	65.90%	TBD
Competitor A	21.02%	18.22%	TBD
Competitor B	30.85%	40.00%	TBD
Competitor C	37.68%	22.67%	TBD
Socioeconomically Disadvantaged			
	10-11	11-12	12-13
CSSD	62.31%	65.47%	TBD
Competitor A	17.79%	20.88%	TBD
Competitor B	34.48%	39.71%	TBD
Competitor C	40.00%	24.42%	TBD



ticipation on enrollment, segmented by grade level, has shown an overall upward trend. In a process of refinement, during the 2014-2015 school year, CSSD began analyzing participation by additional segmentation of student subgroups. Since trend data is not yet available, this and segmented data by resource center and even by individual teacher are AOS. Due to CSSD's unique structure, which is unlike any of its competitors, comparisons are not available.

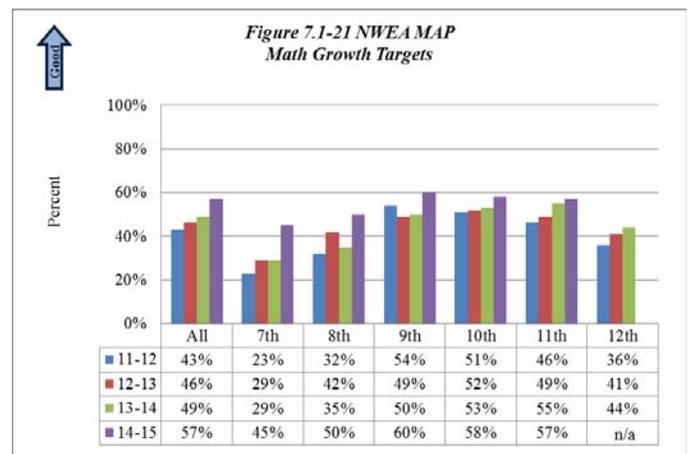
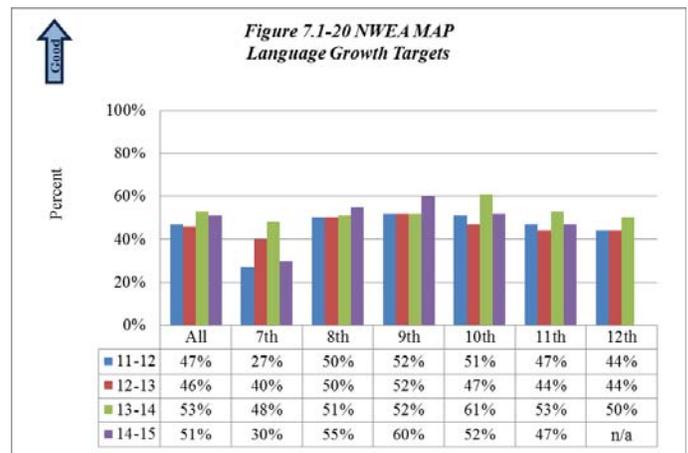
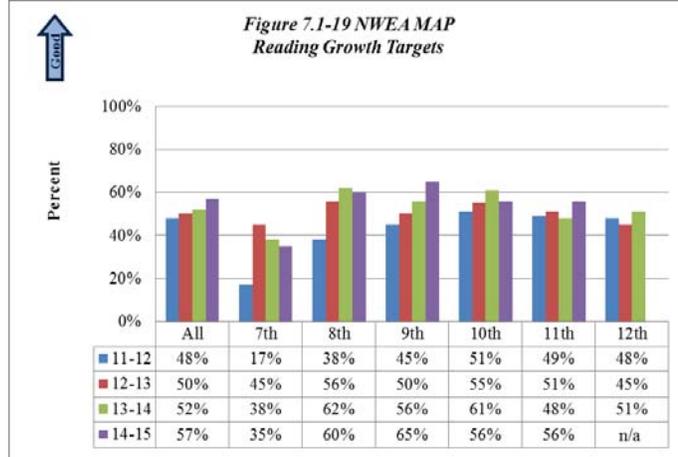
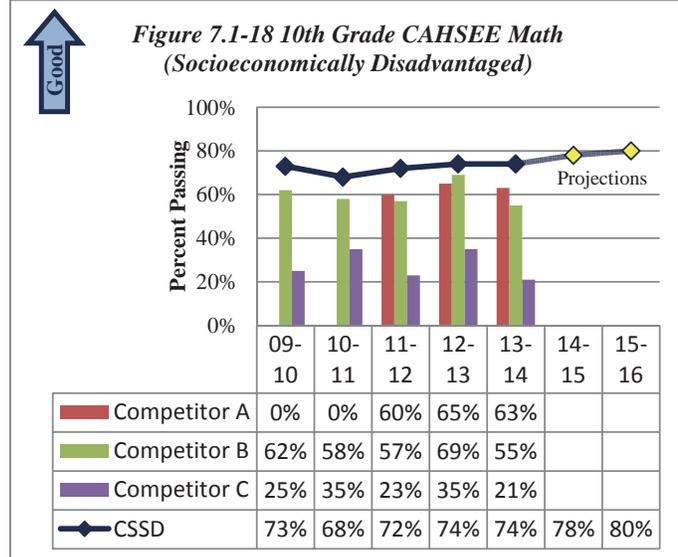
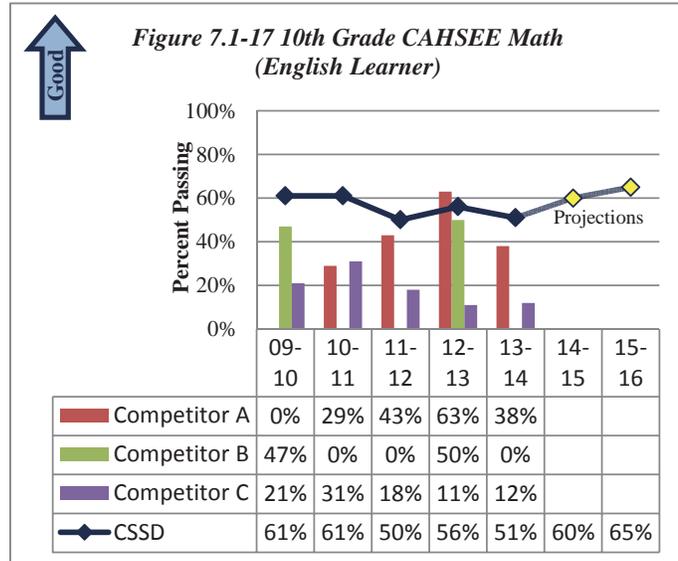
In California, the CAHSEE is the only required assessment to receive a high school diploma. The exam covers ELA and Math and is administered to students beginning in the 10th grade. Comparative data is available for five years for competitors. Due to the nature of CSSD's instructional design and the difference in assessments, comparative data on alternative schools throughout the country is not available. It is important to note that though CSSD consistently outperforms its competitors, the data presented is relatively flat because, year over year, 10th grade students enter further behind in academic skills than students in the previous year. CSSD consistently outperforms its competitors on segmented CAHSEE data by student subgroups as well (Figures 7.1-11-18). Given that students continue to come to CSSD further behind, the school maintains a high level of CAHSEE pass rates. CSSD attributes this to the successful integration of the PPEP process.



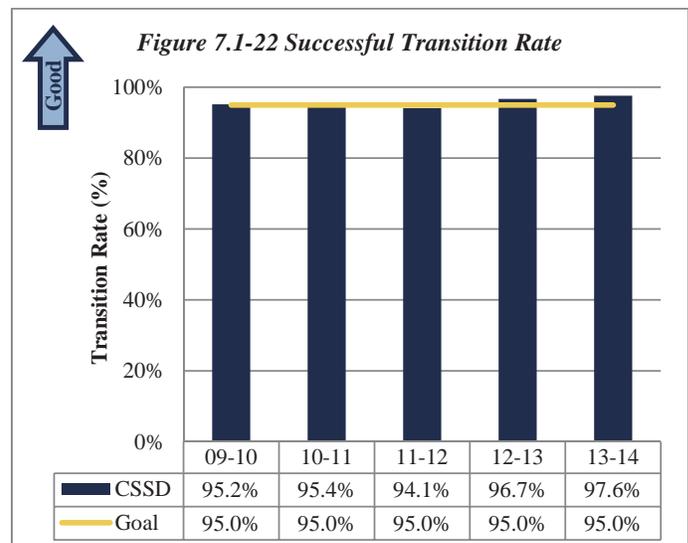
To monitor and measure individual student growth during the school year, CSSD uses Northwest Evaluation Association’s (NWEA) Measures of Academic Progress (MAP), a nation-

ally normed test, in grades 7-11 for assessment of students in math, reading, and language usage. Students are assessed in the fall and spring using the MAP assessment so that CSSD’s

instructional team can measure individual student growth and predict performance of CAHSEE assessments. Benchmarks are not available since competitors do not use the same assessment tools. This method is above and beyond most charter schools' assessment practices. During the last four years, CSSD has seen an overall upward and favorable increase in the number of students who have met their MAP growth targets (Figures 7.1-19-21).



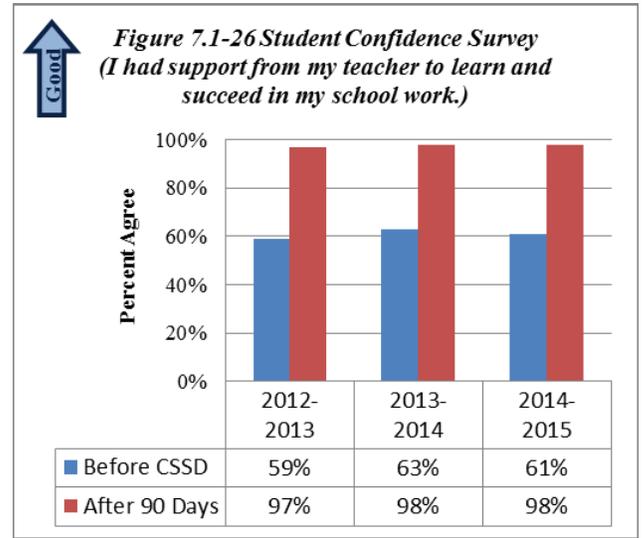
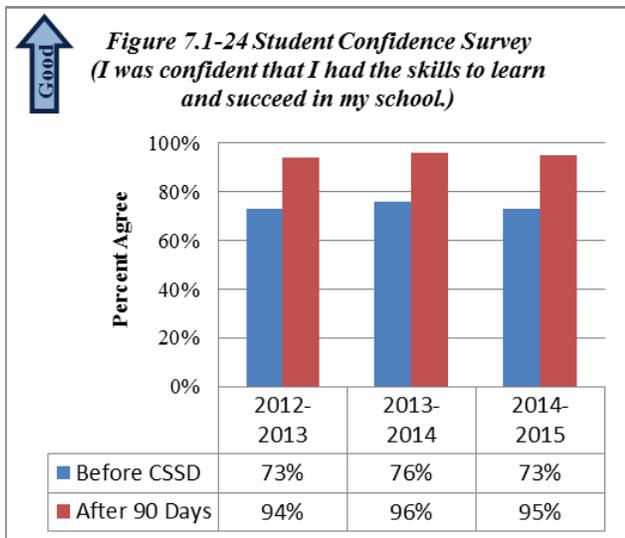
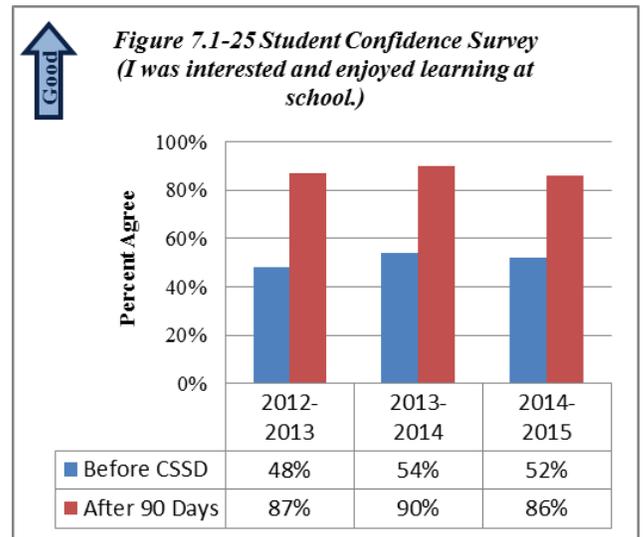
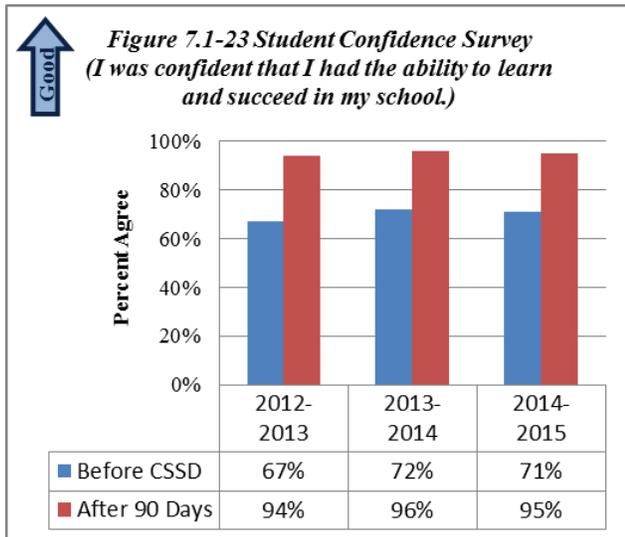
The PPEP's ultimate goal is to transform students' lives by helping them graduate with a diploma or by redirecting them back to a traditional school site. Each year CSSD tracks where each student transitions successfully. Over the past 5 years, CSSD demonstrated an overall increase in successful transitions and exceeded its goal of 95% in four of the five prior years (Figure 7.1-22). This result satisfies the key student requirement of achieving their education goals as created through the PPEP. It also meets the key parent requirement to provide an environment where their child can graduate high school and have a plan for workforce/college.



CSSD strongly believes it is important for students to build and demonstrate increased confidence in their learning while a student is enrolled at the school. CSSD measures this by tracking student confidence levels during Phase 1 of the PPEP versus their confidence in school during Phase 2. Many students enroll disengaged and uninterested in school due to lack of skill level from years of inadequate learning at their previous schools. Their confidence levels are low with little hope for the future. It is important for the CSSD instructional staff to understand where each student is in terms of their confidence levels so they can encourage and engage them by utilizing a variety of strategies. Through the effectiveness of the PPEP, CSSD students have demonstrated a strong increase in student confidence through the results of the Student Confidence Survey (Figures 7.1-23-29). The following charts indicate parent satisfaction for a key customer requirement, “For my child to become academi-

cally motivated and self-disciplined.” On average students are showing an increase in confidence from 20% to 42% in each of the last three years. Confidence leads to engagement, engagement leads to learning, and learning leads to the ability to *Transform Lives*.

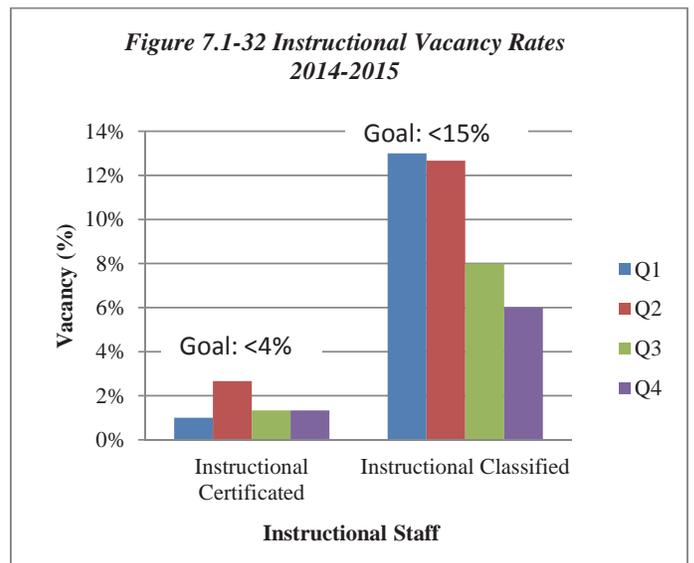
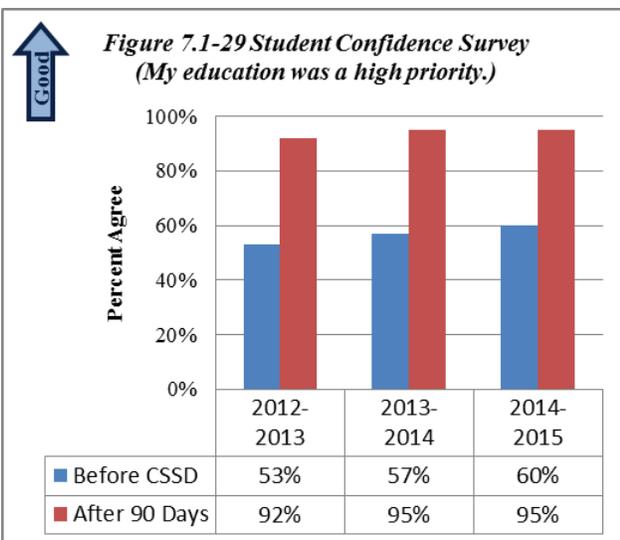
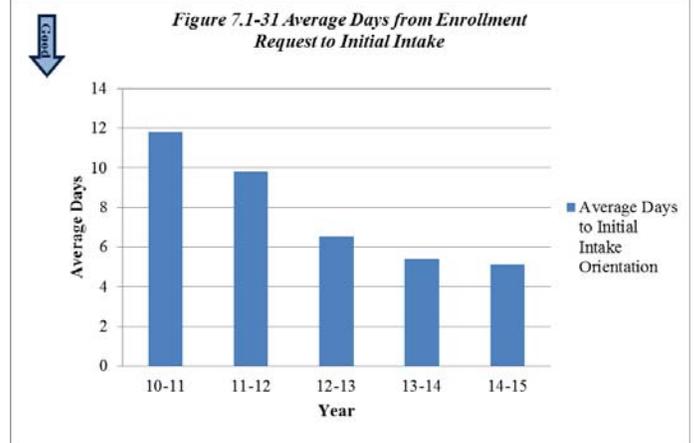
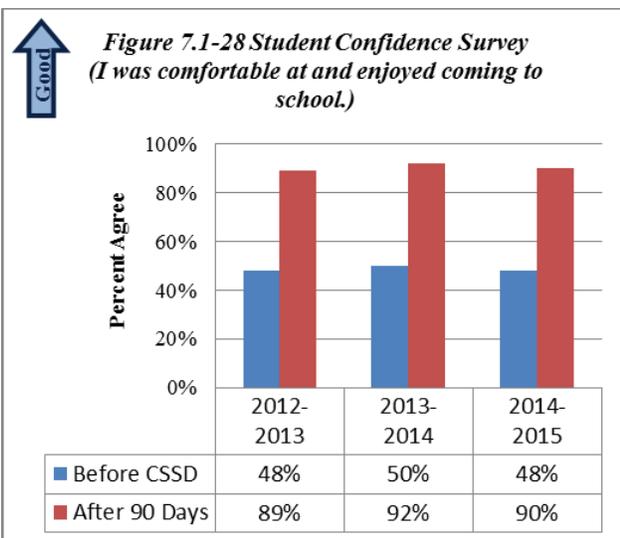
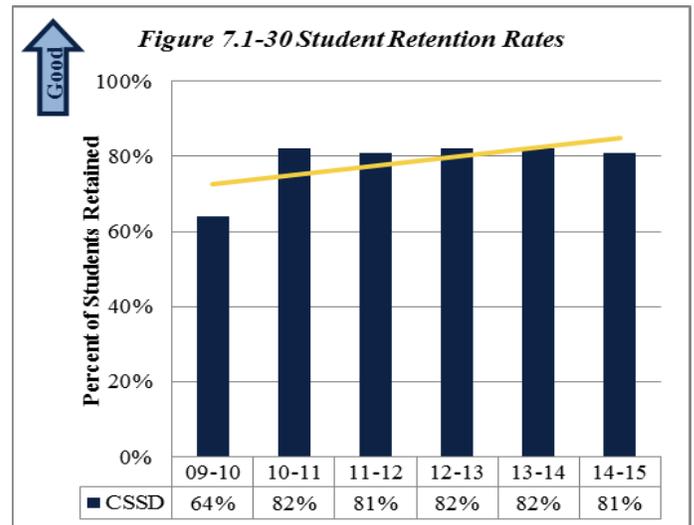
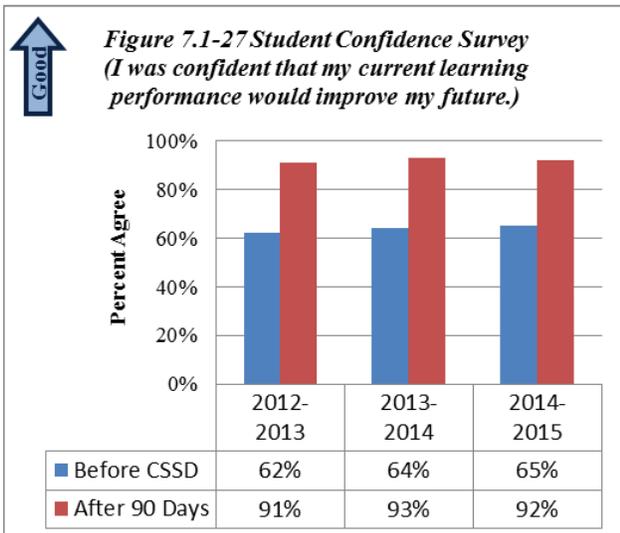
During the beginning of Phase 2 of the PPEP, teachers collaborate with each new student and their parent(s) to discuss their desired Pathway (post-secondary plan). Teachers work with each student to create goals that will help drive them to finish high school and successfully transition into the next phase of their lives. Based upon overall, school-wide PPEP results, SI, goals and AP are created or adjusted. For example, in 2012 CSSD established eight honors courses to meet the growing demand of students interested in attending a 4-year university, and in 2014, CSSD established military science courses to engage students interesting in serving our country in the military.



**7.1b Work Process Effectiveness Results**

**7.1b(1)** The PPEP’s proven effectiveness is demonstrated through increased student retention rates over the last five years (Figure 7.1-30). As students become engaged in their PPEP and the overall instructional program, CSSD has seen more students stay longer and meet their PPEP goals. Higher retention rates lead to higher graduation rates and lower dropout rates.

Many times parents are anxious to enroll their son or daughter into CSSD because their student is not making adequate academic progress and needs an alternative learning environment immediately. During Phase 1 of the PPEP, it is important for students and parents to know they can immediately begin their work as a student at CSSD once they have made the important decision to enroll. Over the past five years, the CSSD Student

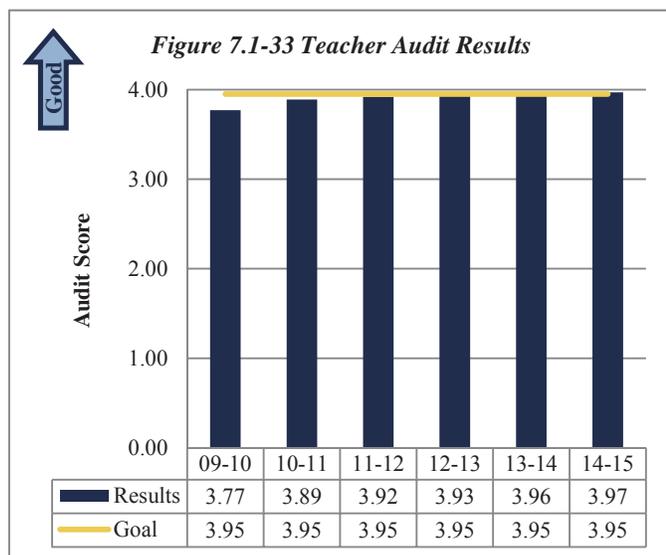


Services Center Department has made great strides to ensure timely enrollment of students by working efficiently to cut down the number of days it takes for parents and students to attend their intake orientation and begin enrollment. During the 2014-2015 school year, the average number of days it took to enroll was 5.1 days, a decrease of 7 days from the 2010-2011 school

year (Figure 7.1-31).

As CSSD has grown over the past 20 years, the need to add instructional staff continues to be a strategic challenge. Even with very high retention rates, CSSD carefully monitors the vacancy rate of its certificated and instructional staff so that the HR staff can meet its goal rates and also anticipate future instructional staffing needs. Based upon a thorough hiring process (Figure 5.1-2) and a regular increase in the number of applicants, CSSD has met the goals for vacancy rate expectations (Figure 7.1-32).

As part of the California compliance requirements for Independent Study, teacher files for student records are required to be audited by an external auditing firm. Examples of audited items include Master Agreements, student work samples, student sign-in sheets, and student enrollment documents. As part of individual teacher scorecards, these audits are scored on a 4.0 scale with 3.95 being the goal for all teachers to meet. In the last two years, CSSD teachers have exceeded the goal of 3.95 (Figure 7.1-33).



CSSD is committed to providing the best instructional staff to its students. Through the thorough Capability and Capacity Assessments performed through the CKMS, a stringent Hiring Process and CSSD’s highly effective PD program, AU, CSSD has successfully had 100% of its courses taught by HQ teachers over the past 5 years (Figure 7.1-34).

In California, the rigor and quality of a high school’s instructional program and courses are often measured by their accreditation and their University of California (UC) established “a-g” course list. Admissions departments for both University of California schools and California State University (CSU) schools look at the UC a-g list to determine what opportunities students had in high school and how well they performed in their “a-g” courses. For a course to be certified as meeting the “a-g” requirements, a detailed syllabus (as well as other pertinent information) must be submitted to UC for approval. The UC faculty has ultimate responsibility for determining whether courses meet the rigor and content guidelines to be certified as a college preparatory (“a-g”) course for UC and CSU. Currently, CSSD has 122 courses approved by UC, which is 67 more courses than its next closest competitor (Figure 7.1-35).

Year	Percent
2010-2011	100%
2011-2012	100%
2012-2013	100%
2013-2014	100%
2014-2015	100%

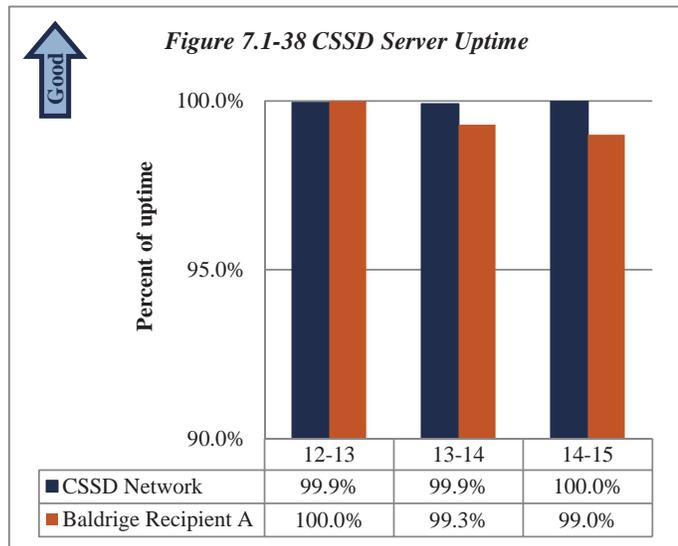
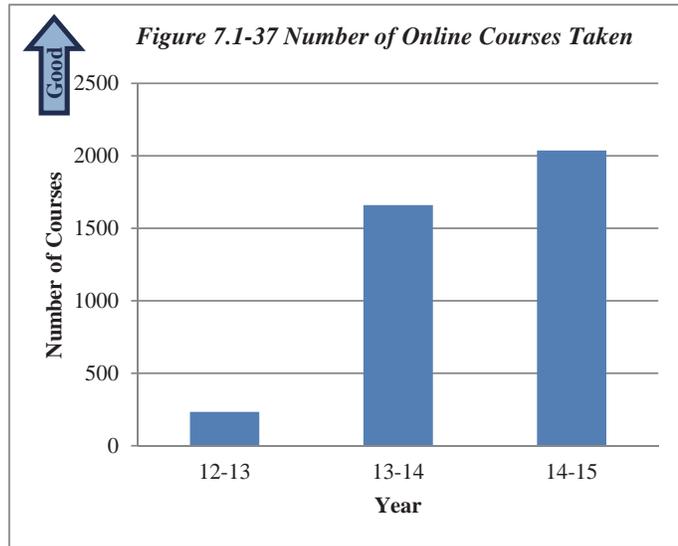
Subject	CSSD	Competitor		
		A	B	C
ELA	22	8	9	0
Math	29	6	12	0
Social Science	15	5	6	0
Science	12	8	6	0
Foreign Language	26	4	12	0
VAPA	6	1	0	0
Electives	12	3	10	0
Total	122	35	55	0

7.1b(2) To support the common requirement of safety among students, parents, and workforce members, CSSD provides a comprehensive emergency plan. Results are in Figure 7.1-36. Over the last 2 years CSSD has increased the number of training hours offered to workforce members to ensure continued safety.

Indicator of Emergency Preparedness	10-11	11-12	12-13	13-14	14-15
Drill Compliance	100%	100%	100%	100%	100%
Drills Conducted Per Year	100%	100%	100%	100%	100%
CPR Training Offered at No Cost	N	Y	Y	Y	Y
Blood Borne Pathogens Training	100%	100%	100%	100%	100%
Staff Required to Wear Badges	n/a	100%	100%	100%	100%
Electronic Notification System	n/a	100%	100%	100%	100%
Locations with Access to Emergency Response Information	100%	100%	100%	100%	100%
Locations with Printed Emergency Response Information	n/a	n/a	100%	100%	100%
Locations with Emergency Package	100%	100%	100%	100%	100%
# of All School Safety Trainings	4	4	8	9	9
# of Individual Location Trainings	n/a	3	3	80	80
Staff Satisfaction with Safe Environment (%)	n/a	n/a	n/a	97.2%	n/a
Student Satisfaction with Safe Environment (%)	99.2%	99.6%	99.0%	99.4%	99.2%
Parent Satisfaction with Safe Environment (%)	n/a	99.7%	99.2%	100.0%	99.6%

### 7.1c Supply-Chain Management Results

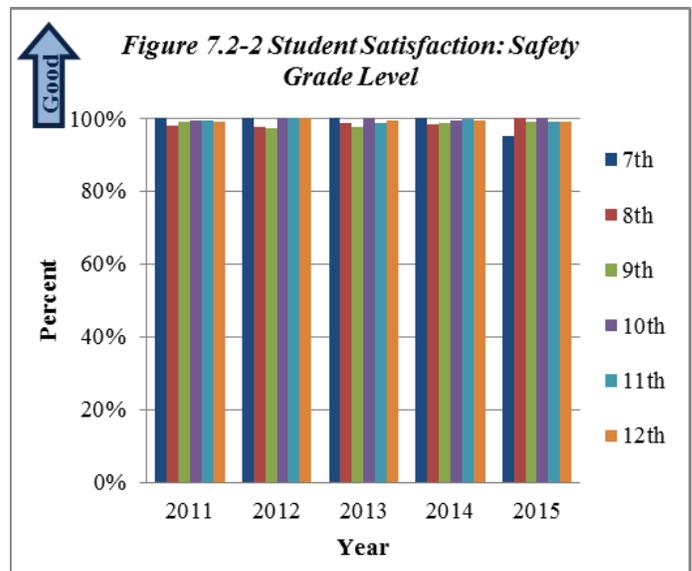
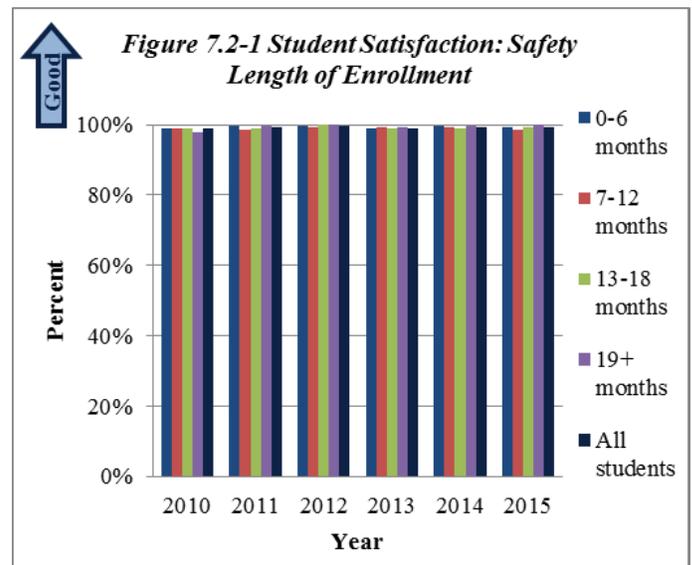
7.1c CSSD works closely with its suppliers to ensure their products are contributing to enhancing overall CSSD performance. Edgenuity, CSSD’s online curriculum provider has provided CSSD staff hundreds of hours of PD, both onsite and over the web, since its implementation in 2012. This training has resulted in a significant number of online courses issued to students (Figure 7.1-37). Over the last three years CSSD’s server uptime results have demonstrated excellent performance (Figure 7.1-38).



### 7.2 Customer-Focused Results

7.2a Student- and Other Customer-Focused Results For the past decade, CSSD has systemically monitored student and parent satisfaction levels and trends as they relate to key customer requirements (Figure P-5), competitors and national benchmarks. CSSD administers Student and Parent Satisfaction Surveys annually to obtain actionable information regarding safety, the quality of CSSD’s educational program, and overall satisfaction with meeting student PPEP goals and targets (Figure 6.1-3). These results are analyzed through the OPMR and serve as key inputs into the SPP.

Students who enroll at CSSD expect a safe and supportive learning environment. To ensure that all CSSD students feel safe



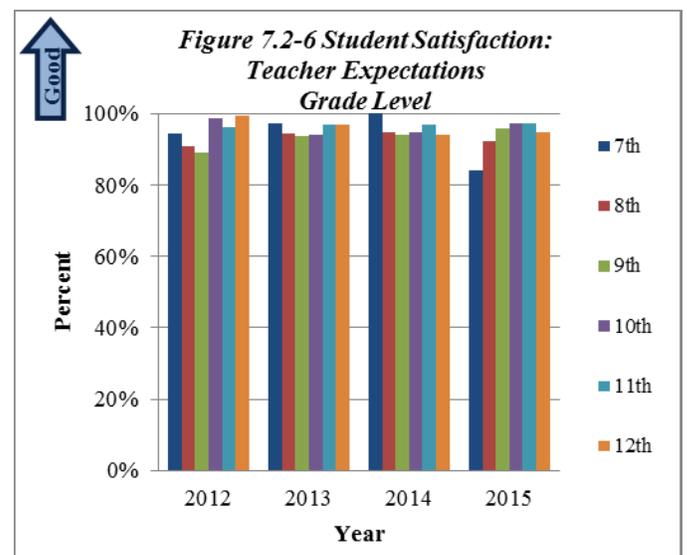
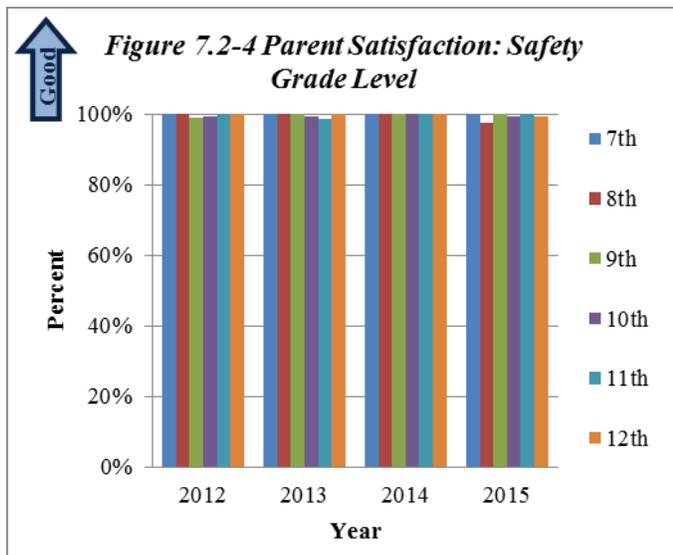
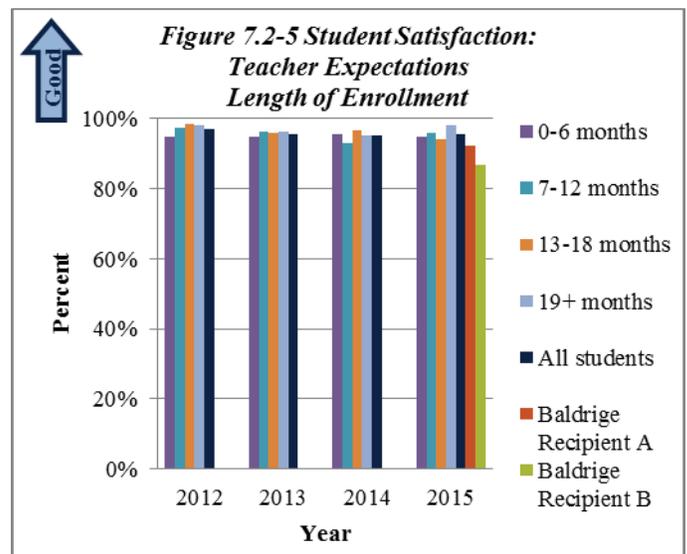
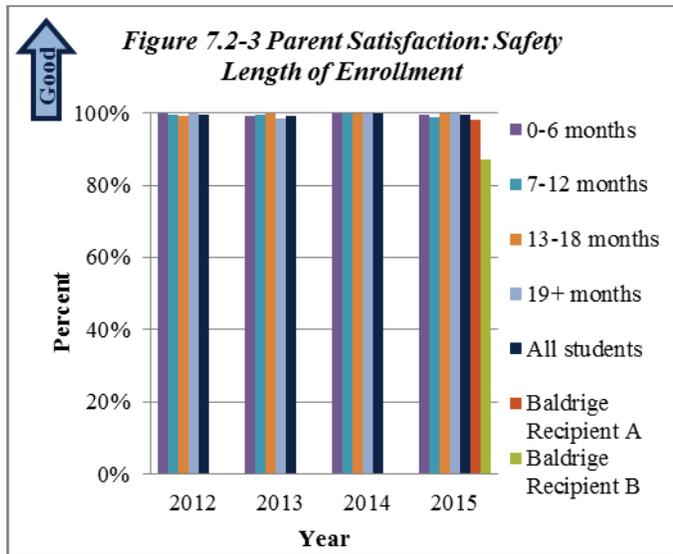
and supported while they are learning in a CSSD RC, student safety satisfaction data is segmented by length of student enrollment (Figure 7.2-1), grade level (Figure 7.2-2) and by RC (AOS). For the past five years, student safety satisfaction results indicate that, on average, 99% of enrolled students feel safe and supported in their learning environment. This data is monitored for patterns across length of enrollment, grade levels, and RCs to adjust processes and procedures if necessary. Because safety is a key customer requirement and essential to CSSD’s students’ learning, CSSD strives for 100% student safety satisfaction.

Student safety is also a key requirement for CSSD parents. Parent satisfaction survey results for the past five years indicate that 99% of parents feel that their child is learning in a safe and supportive environment. This percentage compares favorably with the 2014 levels for national educational Baldrige Recipients A and B (Figure 7.2-3). Parent safety satisfaction results are segmented by their student’s length of enrollment (Figure 7.2-3), grade level (Figure 7.2-4), and RC location (AOS) to ensure that safety is maintained across the student’s length of enrollment and all locations. The high result is due, in part, to CSSD’s commitment to providing special health and safety trainings to

all employees (Figure P-3).

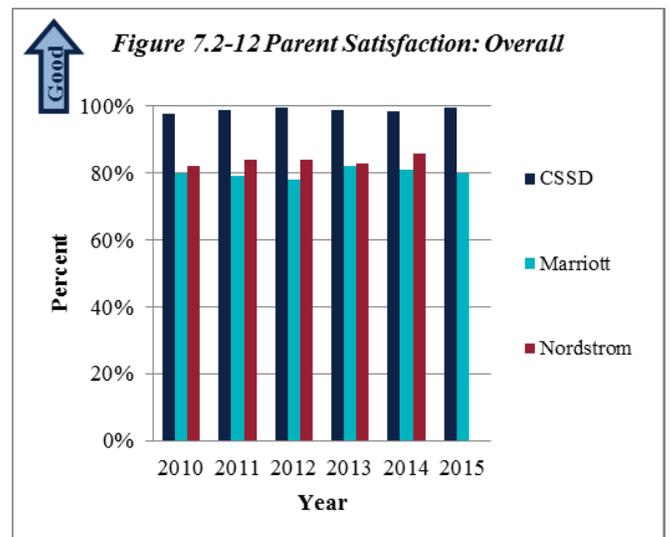
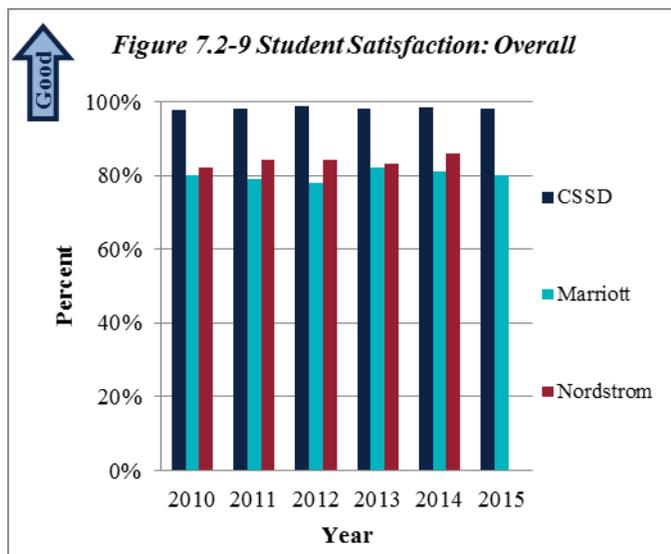
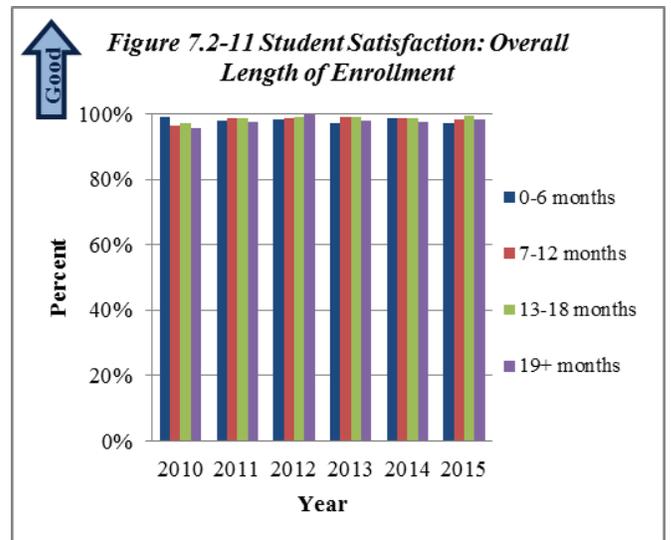
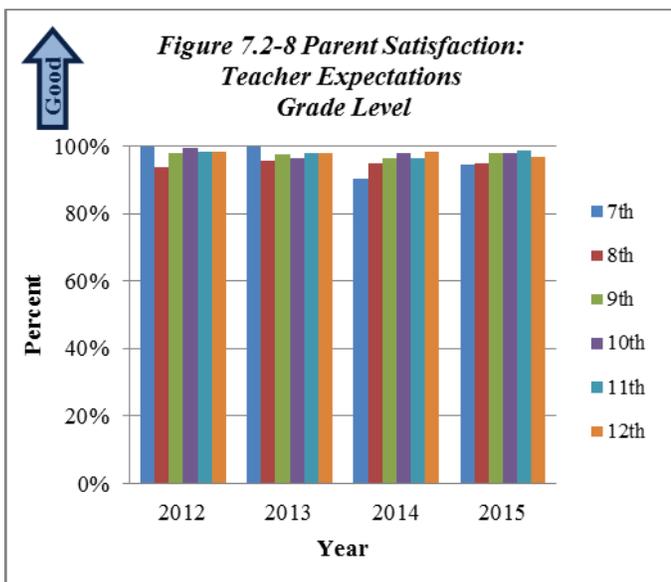
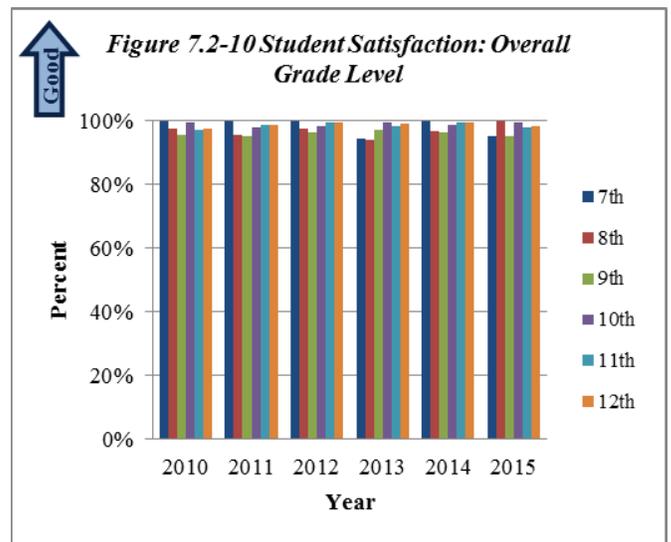
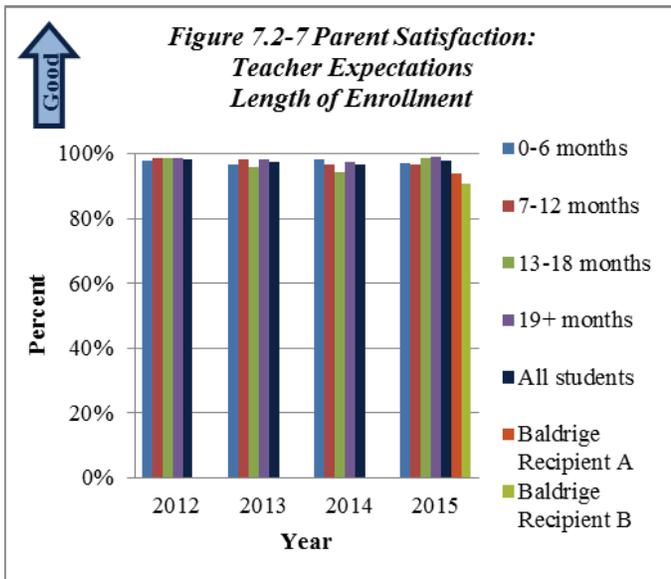
At CSSD, Kids Come First in order to achieve the CC of Transforming Lives. CSSD’s LT, support staff, and instructional team transform lives by providing a personalized, individualized high quality educational experience while maintaining an environment that is responsive and accountable to all stakeholders. CSSD teachers believe that all students can be academically successful. Student and parent satisfaction survey results for the past four years indicate that, on average, 95% of students (Figure 7.2-5) and 97% of parents (Figure 7.2-7) believe that CSSD

teachers hold high expectations for all students. CSSD’s percentages for both students and parents rank higher than national educational Baldrige Recipients A’s and B’s 2014 percentages. All teacher expectation satisfaction survey data is segmented by student’s length of enrollment, grade level, and RC location to ensure consistency across students’ entire educational experience at CSSD and at all locations. Parents of students and students at all grade levels (Figure 7.2-8, Figure 7.2-6) at any point during their enrollment (Figure 7.2-5, Figure 7.2-7) consistently believe that their teachers hold high expectations for them.

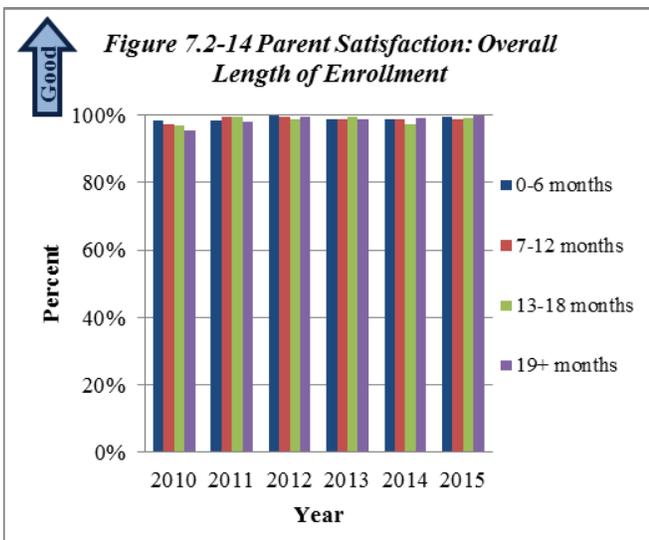
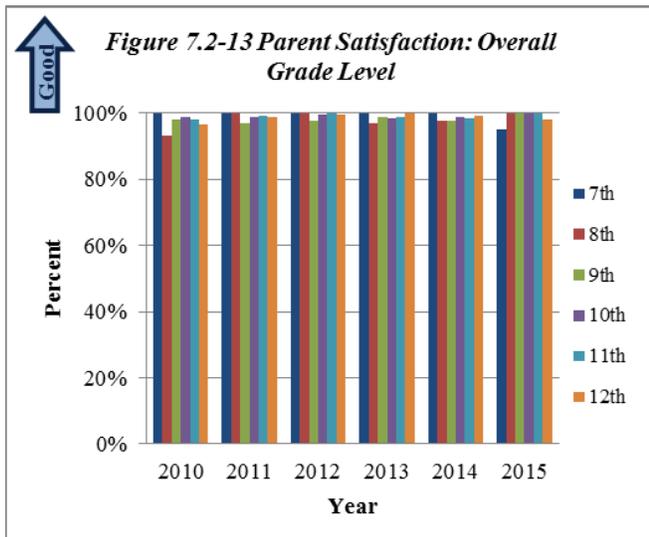


One way CSSD has been innovative in delivering a high quality educational option to families is by running the school like a business. To achieve outstanding customer service, CSSD has chosen to benchmark outside of the education industry. For the past five years, CSSD’s overall student and parent satisfaction results have bested both Nordstrom and Marriott Hotels, which includes customer satisfaction results from its luxury brand The Ritz Carlton. Student overall satisfaction results (Fig-

ure 7.2-9) and satisfaction for all segments (Figure 7.2-10, Figure 7.2-11, AOS) remains at about 98%. Parent overall satisfaction results with meeting their student’s PPEP goals and targets is consistently 98% for the past five years (Figure 7.2-12). This remains true when survey results are segmented by grade level (Figure 7.2-13), student’s length of enrollment (Figure 7.2-14), and RC location (AOS).



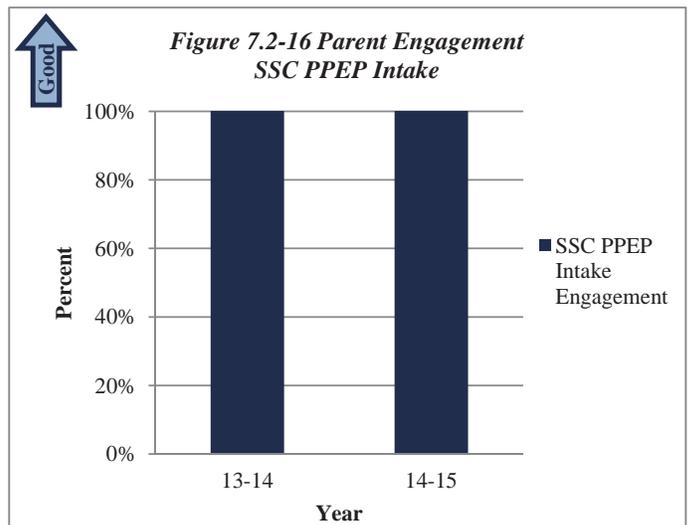
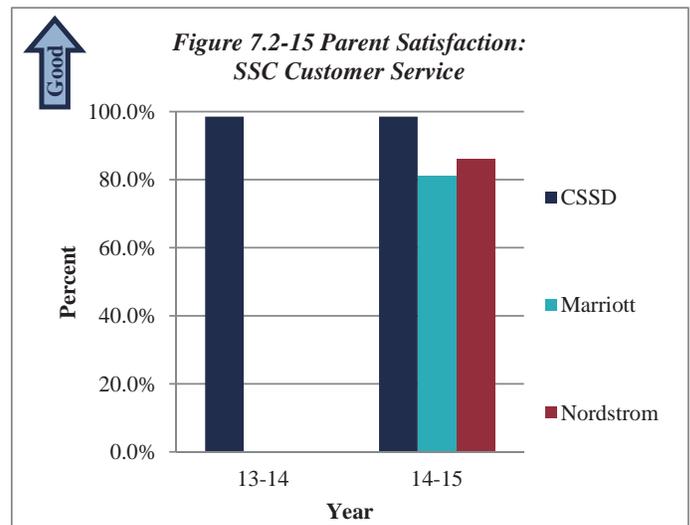
In an effort to ensure that CSSD students and parents receive the best customer service possible from their first contact with the school, CSSD implemented a SSC Customer Service Satisfaction Survey in 2013. Every parent completes this survey dur-



ing the student Intake process. Parents’ satisfaction level with their service that day is segmented by SSC support staff member, location, and the enrolling student’s grade level and RC location preference. All segmented results are AOS. CSSD’s SSC customer service satisfaction data is reviewed on a daily basis to help LT members and SSC support staff members to collaborate on ways to improve customer service. CSSD strives to attain 100% customer service during the Intake process, and chooses to benchmark itself against companies outside of the education industry who are widely known for excellent customer service. For the past two years, the overall SSC customer service satisfaction results have been 99%, which is more than 10% higher than Nordstrom’s and Marriott Hotels’ overall customer service satisfaction results (Figure 7.2-15).

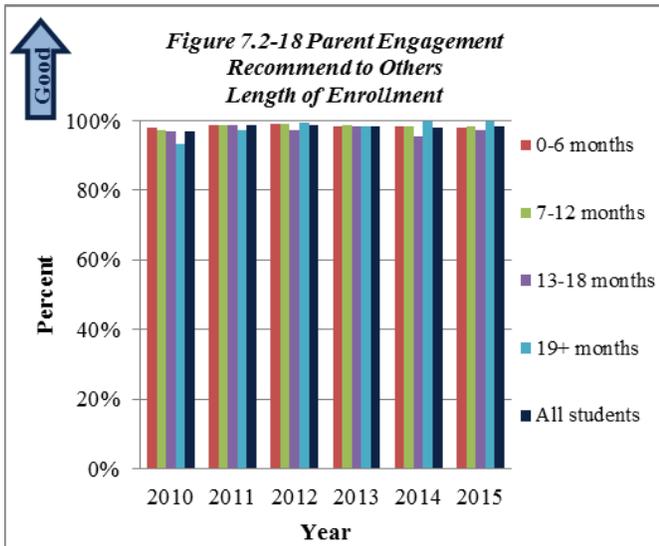
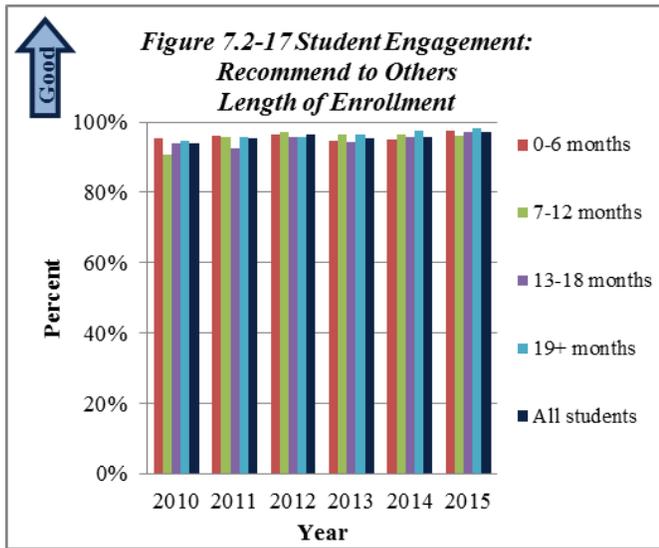
**7.2a(2)** In addition to creating a safe and supportive environment where students can perform at their highest levels, CSSD actively seeks to engage its students, parents and stakeholders to achieve continued success. CSSD works to engage students and parents from their first interaction with the school. The SSC Customer Service Satisfaction Survey, completed by every parent during the student Intake process, asks parents if, after listening to the orientation, they feel CSSD will meet their student’s

needs. Since 2013, 99% of parents have responded that they believed CSSD would meet the needs of their student by engaging them in their own education (Figure 7.2-16). SSC customer engagement results are segmented by SSC support staff member, location, and the enrolling student’s grade level and RC location preference. All segmented results are AOS. All CSSD SSC support staff work diligently to engage students and parents in the education process. Engagement survey results are reviewed daily by the SSE and Communication Departments and then again as part of the OPMR process and through CKMS methods. Results serve as a key input into the PDIS to innovate new or improved processes and to increase customer engagement. CSSD strives to attain 100% engagement from students and parents to help boost student achievement.



According to research conducted by Constellation Research and published in the Harvard Business Review, engaged customers are three times more likely to recommend or advocate a product or service to a friend. CSSD systematically tracks students’ and parents’ likelihood to recommend CSSD to a friend or family member through the Student and Parent Annual Satisfaction Surveys. Overall, 95% of students for the past six years have indicated that they would recommend CSSD (Figure 7.2-17), and 97% of parents have expressed their willingness to

recommend CSSD to a friend or family member (*Figure 7.2-18*). The numbers remain consistently high when segmented by length of enrollment (*Figures 7.2-17-18*), grade level (AOS), and RC location (AOS).



Another key measure of student engagement is CSSD’s suspension rates. *Figures 7.1-23-29* show that students’ confidence during their first 90 days at CSSD skyrockets. This increased confidence leads to higher academic achievement and engagement levels. Engaged and self-disciplined students are less likely to participate in behaviors and activities that result in suspension. CSSD’s suspension rates hover around 0%, which compares favorably with local competitors who offer a similar educational program (*Figure 7.2-19*).

Since 2012, CSSD has made a concerted effort to engage students, parents, and all stakeholders through web-based technology and social media. The Communications Department collaborates with SL, the LT, instructional workforce members, and key support process workforce members to produce posts that will increase customer and stakeholder engagement. As referenced in *Figure 7.2-20*, CSSD launched its Facebook page in 2012. The number of “likes” has trended upward each month to the current level of 183 “likes”. The Facebook page

is monitored by the Communications Department several times a day for overall levels and trends and for levels of engagement and trends for specific posts. This data is reviewed at the Strategic Sustainability meeting to innovate ways to increase stakeholder engagement. The same holds true for CSSD’s Google+ and Yelp pages. Views on CSSD’s Google+ page have increased by 61,046 views in one year, and Yelp views have increased by nearly 200% since 2012. This increase in engagement has resulted in an increase of enrolling students who say they learned about the school through the internet or social media. This number has increased from 15% to 27% over the past three years (AOS).

**Figure 7.2-19 Suspension Rates**

Suspension Rates				
Year	CSSD	Competitor A	Competitor B	Competitor C
09-10	0.0%	n/a	n/a	n/a
10-11	0.2%	n/a	n/a	n/a
11-12	0.0%	0.0%	0.3%	0.0%
12-13	0.1%	0.2%	0.7%	23.8%
13-14	0.0%	0.3%	0.4%	18.9%

**Figure 7.2-20 Social Media/Web-Based Tools Engagement**

	12-13	13-14	14-15
Facebook Likes	0	106	183
Google+ Views	0	0	61046
Yelp Views	2	94	200

**7.3 Workforce Focus Results**

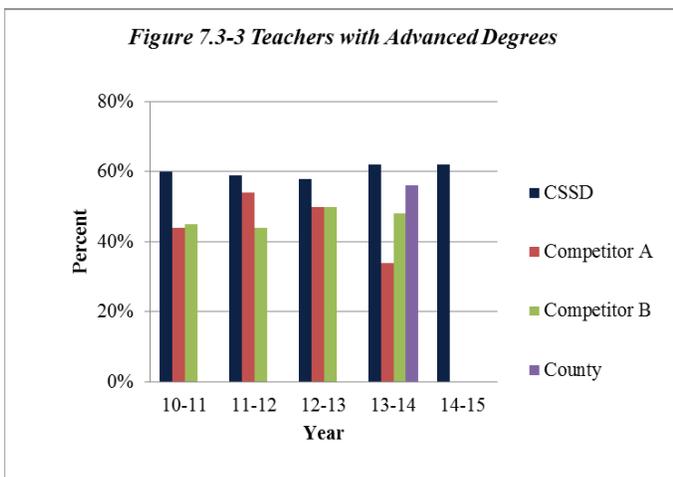
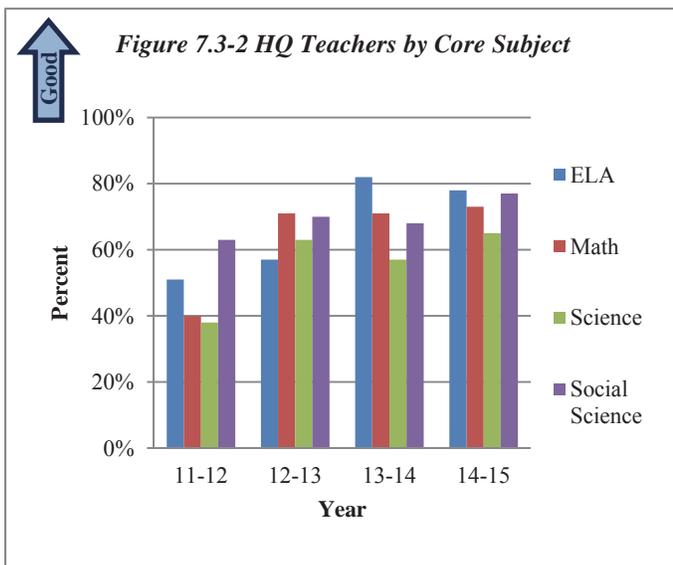
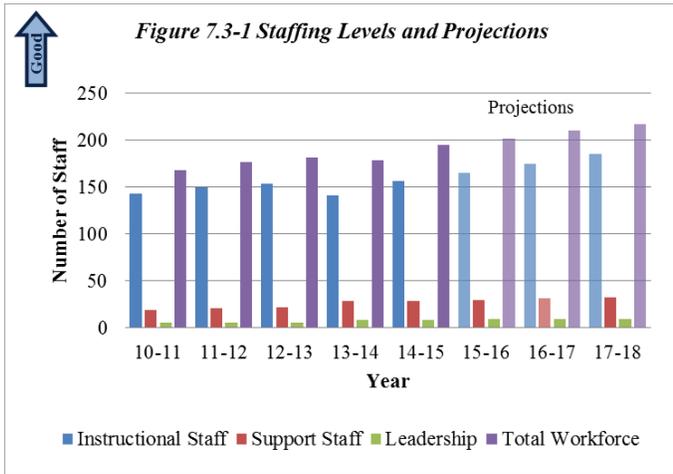
CSSD recruits, hires, and retains HQ and dynamic workforce members who put kids first. The CKMS is a key deployment tool for maintaining strong workforce engagement, development, and capability results.

**7.3a Workforce-Focused Results**

**7.3a(1)** The HR department has increased its staffing levels to meet the needs of increasing enrollment as shown in *Figure 7.3-1*. The trend in staffing has been a gradual increase over the past five years to meet the needs created by increasing enrollment. Three-year student growth projections indicate staffing levels will need to increase by eight employees each year to accommodate increasing demand. These levels are tracked through the OPMR as well as the weekly capability and capacity meetings to ensure compliance and adherence to student staff ratios.

At CSSD, 100% of courses are taught by HQ teachers which is a differentiator between CSSD and its competitors. Higher expectations and standards is a key factor to the ability to transform lives as HQ teachers are typically more engaged which is essential to the PPEP education model. While all teachers are HQ, CSSD offers additional training through AU to enable each teacher to become HQ in more than one subject area. As shown in *Figure 7.3-2*, trends over the past 3 years have shown an overall increase in HQ levels. Student data is used to anticipate needed AU offerings to increase teacher capabilities. This approach also increases the capacity of the organization so that teachers can move from LC to LC as needed meeting the demand of frequent changes in student demographics. *Figure*

7.3-3 shows CSSD having higher levels of Advanced Degrees for teachers, mostly obtained while at CSSD, fulfilling the workforce requirement for accomplishing meaningful professional development (Figure P-5).



7.3a(2) CSSD puts emphasis on providing a safe and secure environment. HR is specifically concerned with protecting workforce members from injury and providing a safe environment. Proper planning and management of a safety program reduces

injuries and losses. California law guarantees three kinds of workers compensation benefits: medical care to cure the injury, indemnity cash payments for lost wages, and rehabilitation services to enable claimants to return to work. CSSD participates in the San Diego County Schools Risk Management Joint Powers Authority (JPA). If a JPA member has good average loss history, an Experience Modification Factor (EMF) is applied to reward good historical loss experiences. On the basis of 1.0, the average EMF for CSSD for the last 5 years is 0.676 which enabled the school a total savings of \$132,659 (Figure 7.3-5). As shown in Figure 7.3-4, the total claim count for the last 6 years is eight. This is well below that of a Baldrige Recipient (with approximately the same number of employees) and the national education claim average. The total claim paid for these seven claims is only \$7,413.

Year	CSSD	Baldrige Recipient A	National Education Average
09-10	1	10	32.9
10-11	0	8	32.9
11-12	2	12	32.9
12-13	2	13	32.9
13-14	2	n/a	n/a
14-15	1	n/a	n/a

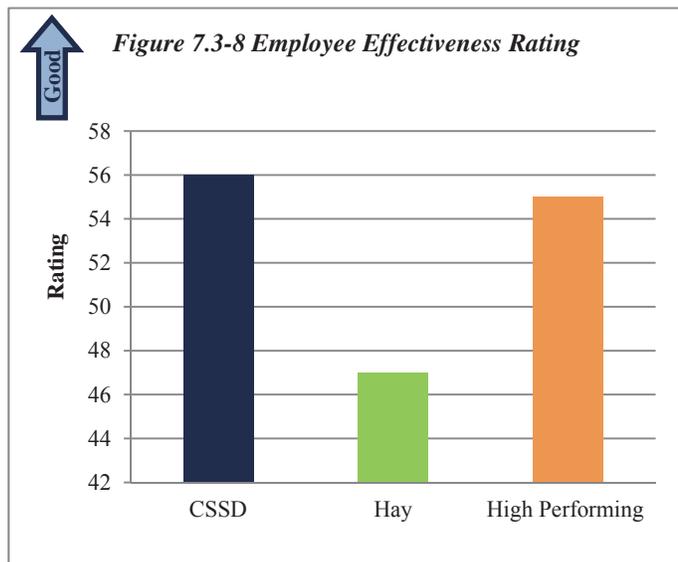
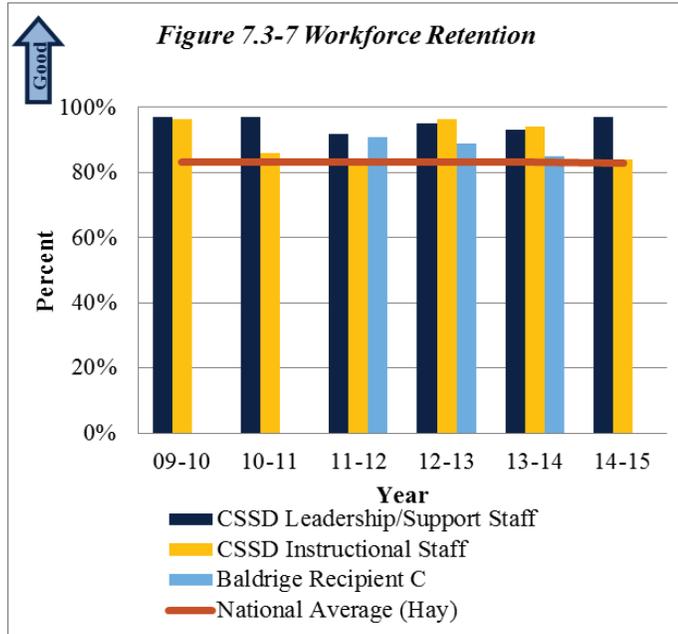
Fiscal Year	Savings
09-10	\$29,049.72
10-11	\$30,423.39
11-12	\$34,595.38
12-13	\$24,021.83
13-14	\$14,568.44
TOTAL	\$132,658.77
<b>5 year savings = \$132,658.77</b>	

CSSD provides a safe and supportive environment, which is the common requirement among students, parents, and CSSD’s workforce. CSSD’s Instructional Staff rated 98.55% and Support Staff/ Leadership rated 96% on having a safe and supportive environment (Result 7.3-6).

7.3a(3) CSSD sustains high levels for Workforce Retention, Effectiveness, and Engagement due to the integration of workforce requirements into the SPP. (Figure P-5) Workforce requirements integrated into the SPP directly impact each individual student’s PPEP. An example is the teacher’s ability to innovate and personalize instruction (engaged in work from Figure P-5) for every student given the fact that teachers have a total roster of only 40 students. This is compared to traditional schools where teachers carry a load of over 140 students. This enriches the lives of students, parents, and the workforce in the effort to Transform Lives.

Figure 7.3-7 reflects CSSD’s retention of HQ staff directly supporting the Workforce Retention goal in SP Strategic Initia-

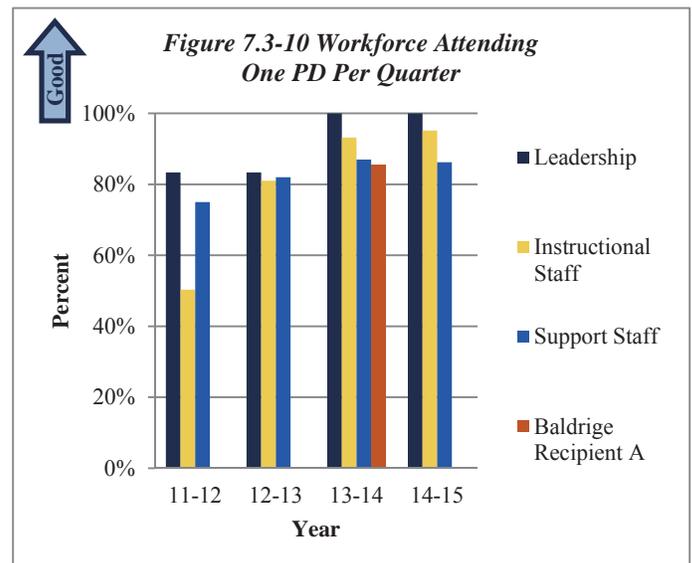
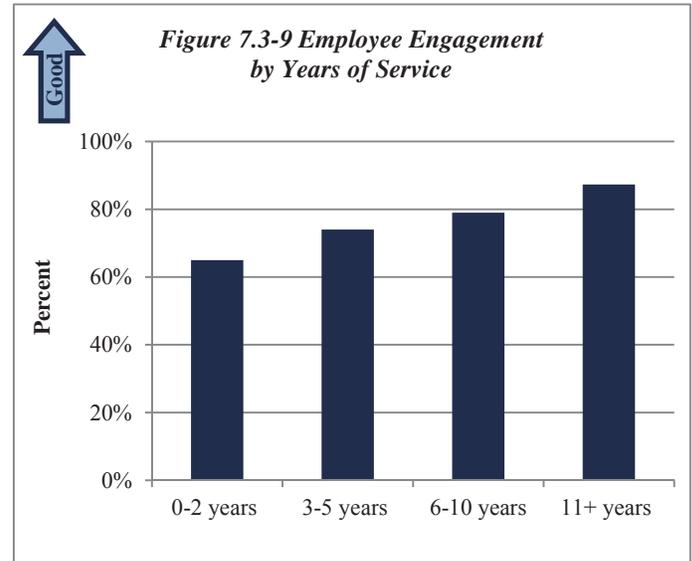
tive 2. The Hay Group managed the 2015 cycle for measuring Employee Satisfaction, Engagement, and Effectiveness. According to Hay, CSSD outperforms both the general industry and high performing industry benchmark. In *Figure 7.3-8*, CSSD outperforms Hay Group high performers on effectiveness of employees. In *Figure 7.3-9*, CSSD segments engagement by years of service to the school which increases greatly over the course of workforce member’s career with CSSD. Retaining a highly effective and engaged workforce directly sustains and supports CSSD’s ability to *Transform Lives*.



**7.3a(4)** A key workforce requirement is to have a meaningful personal development (PD) plan. To meet this need, CSSD enables workforce members to participate and benefit from attending AU trainings. *Figure 7.3-10* indicates increasing levels of workforce members attending a minimum 1 PD each. Strong workforce satisfaction in learning and development opportunities is confirmed in *Figure 7.3-11*. CSSD outperforms a Baldrige education recipient and Hay Group national benchmarks.

Leading Edge Certification (LEC) is a nationally recognized

online teacher certification. LEC guides teachers through rigorous and engaging curriculum based on the International Association for K-12 Online Learning (iNACOL) National Standards for Online Teaching. CSSD adopted the LEC training for teachers in 2012. The certification gives assurance that teachers have the skills to effectively facilitate online courses, and have a solid understanding on enhancing the learning opportunities for students (*Figure 7.3-12*).

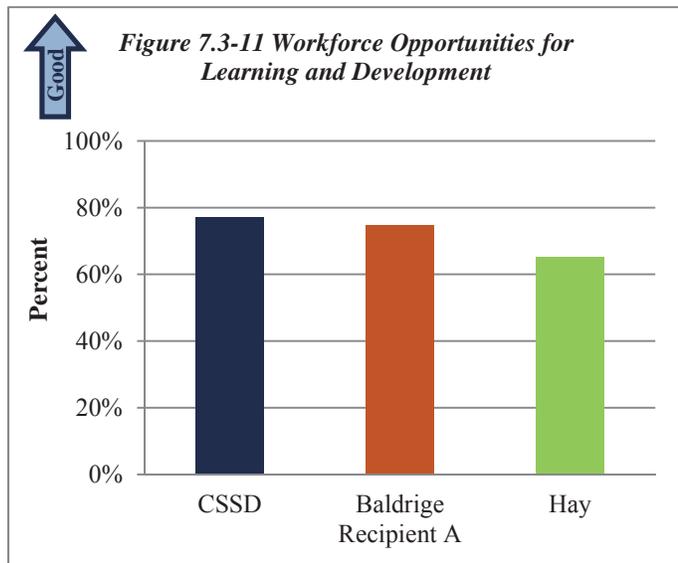


**7.4 Leadership and Governance Results**

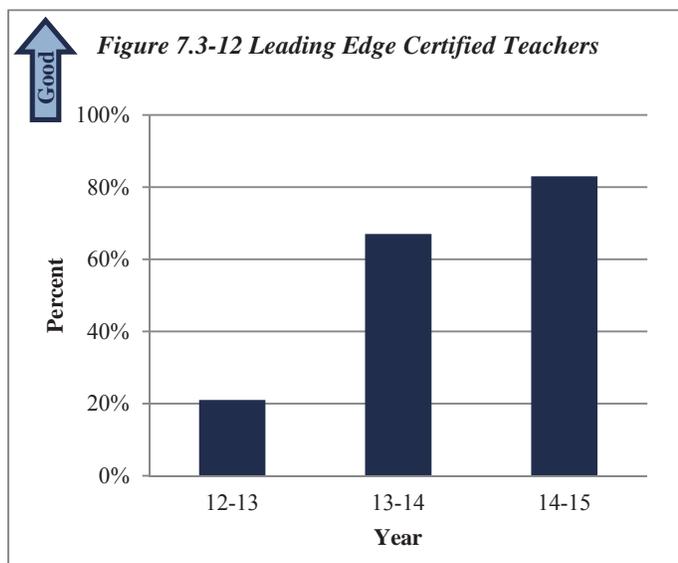
**7.4a Leadership, Governance, and Societal Responsibility Results**

**7.4a(1)** CSSD’s leadership has more than 160 years of combined years of service to the organization. In 2004, the LT chose the Baldrige Performance Excellence Program criteria as its guiding path towards performance excellence believing that a school should be run on the same basic principles of a business. While results are presented throughout Category 7 indicating organizational success, this item reflects results associated with the LT and the BOD that had the vision to create CSSD and have lead it to its success today.

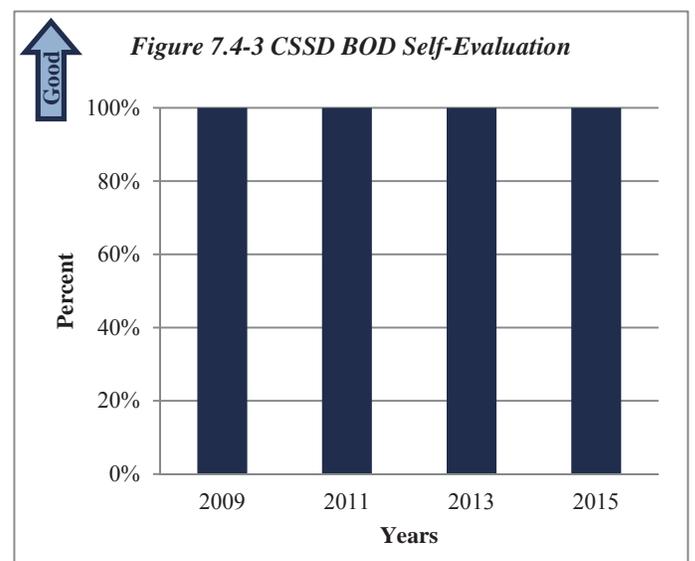
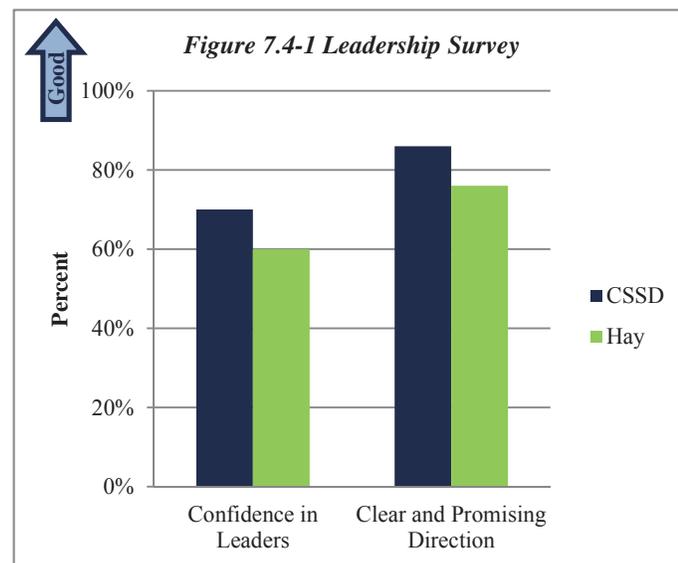
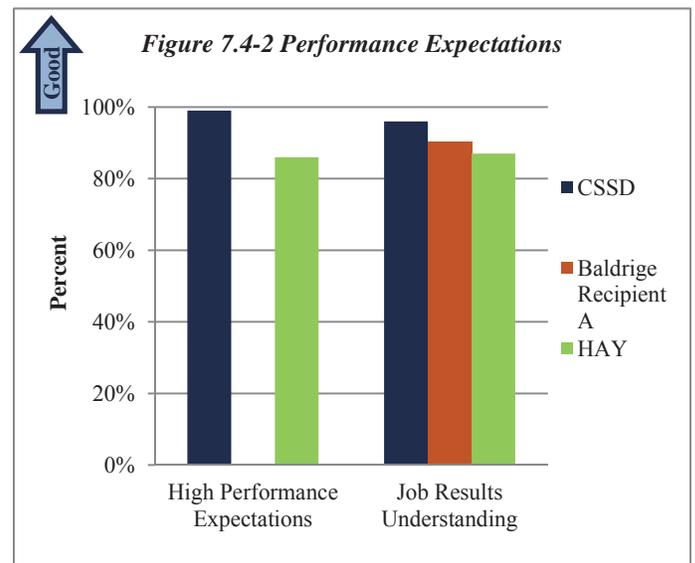
CSSD has implemented several processes over the years to purposely align the workforce to CSSD’s Mission and most



work to overall organization strategy, the CKMS for organizing a systematic communication methodology that is deployed to all stakeholders, and the LMS which demonstrates the alignment of the leadership system to the PPEP (CSSD’s most valued intellectual property) to Transforming Lives. *Figure 7.4-2* indicates the success of these combined efforts in that 96% of CSSD workforce members understand the results expected of them in their jobs. This result compares to a national educational Baldrige recipient performing at 90.4% and a national benchmark of 85%. Further, *Figure 7.4-2* indicates that CSSD workforce members understand that the organization expects a high level of performance from its employees which also outperforms the nationwide benchmark by a large margin (Baldrige recipient confirmed that this was not a question asked on their survey). This coupled with CSSD’s high retention rate as seen in *Figure 7.3-7* indicates a workforce committed to being part of a high-performing organization.



CSSD’s BOD has accomplished a self-evaluation every other year for the past eight years which provides data on the BOD performance at the individual Board member level. While the evaluation is based on self-assessment, the entire BOD

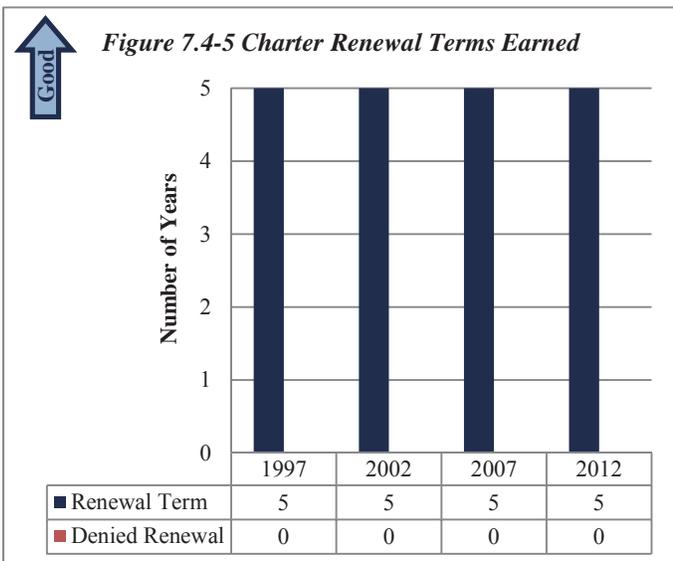
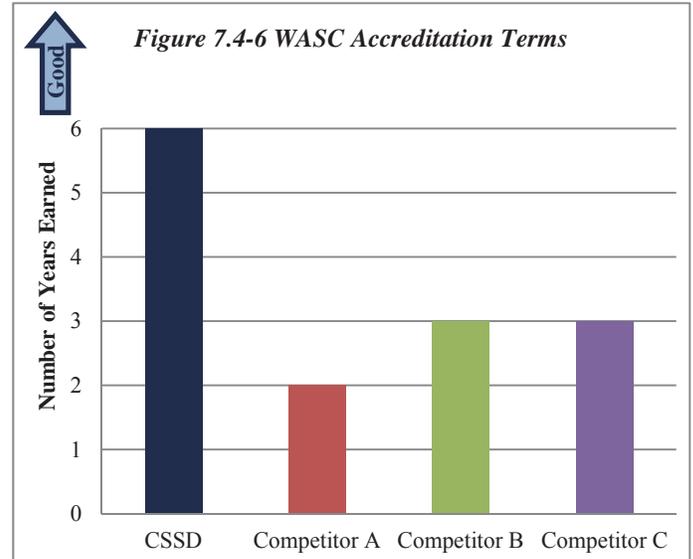
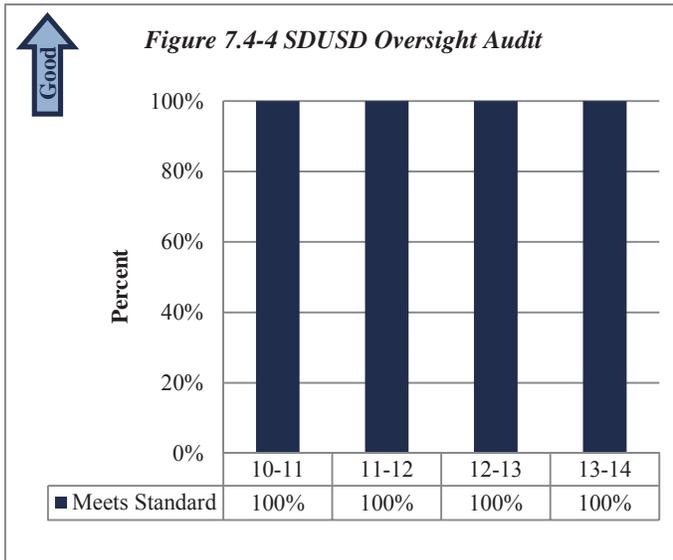


importantly to the CC. Examples include the OPMR for the usage of an organization wide scorecard system that is deployed to each workforce member ensuring alignment of day to day

collectively reaches consensus on overall BOD performance (Figure 7.4-3). While this is not trended data, per se, it is an important consideration of CSSD’s governance.

CSSD is also evaluated on its governance by SDUSD

through an annual audit focusing on compliance with the Brown Act, School By-Laws, Conflict of Interest, sound fiscal management, personal decision policies, resolving internal and external complaints, and oversight of educational program and school safety plans. CSSD has consistently been rated as “Met the Standard”. “Met the Standard” is the highest level possible (Figure 7.4-4).



**Figure 7.4-8 Societal Support of Community Impact**

Years	# of Completers	Lost Taxable Income to Dropout Students	Increase in Income
09-10	576	\$14,226	\$40,970,880
10-11	608	\$14,226	\$34,597,632
11-12	636	\$14,226	\$27,143,208
12-13	665	\$14,226	\$18,920,580
13-14	494	\$14,226	\$14,055,288
14-15	492	\$14,226	\$13,998,384
Total	3471	\$14,226	\$149,685,972

**Figure 7.4-7 Key Ethics Measures**

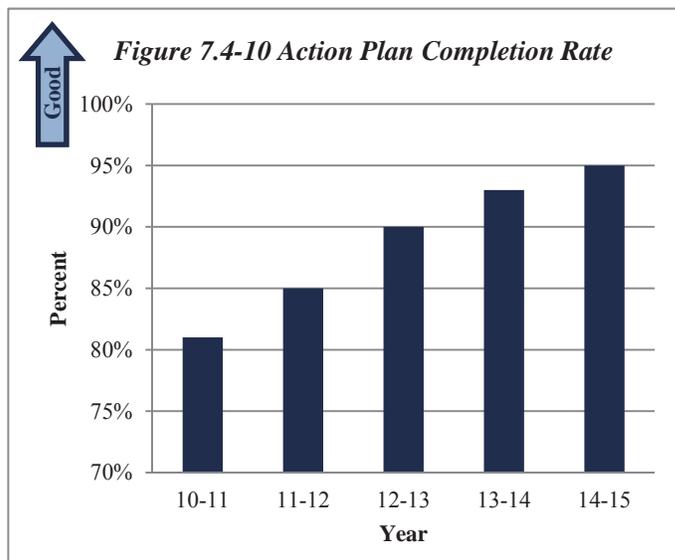
Workforce Segment	Instructional Staff					Support Staff					Leadership				
	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Work Styles Behavior Survey Completed	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Criminal Background Check by Department of Justice Completed	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Employee Handbook and Standards of Conduct Received and Signed	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Signed Student-Staff Interaction Policy	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-Disclosure Agreement	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Signed Code of Ethics	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

**Figure 7.4-9 Key Societal and Community Support**

Areas Supported	Measure	Result
Waste Reduction	Implement Recycling Program	Over 62 recycle bins throughout all locations
Waste Reduction	Utilize Secure Shred and Recycle	21,000 lbs of material shredded/recycled annually
Conserving Resources	Video Conferencing Implemented	Average 115 hours per month for 2 years
Conserving Resources	Computer Donations	Over 100 old laptops donated in 2 years
Conserving Resources	Student Record Archiving	Since 2010 over 12,000 student files stored web-based
Conserving Resources	Online Textbooks	42% of textbooks available to students and teachers online
Conserving Resources	Bus Pass Donations to Students	3 Years over \$22,345 given to students
Conserving Resources	Student Volunteer Hours	3 years over 148,000 student volunteer hours
Conserving Resources	Increase in automatic light turn-off	50% of facilities have light turn-off capability
Conserving Resources	Increase in facility air-controls	100% of facilities have air-control capability
Health and Wellness	Student Immunization Rates	99% Student Immunization Rate
Health and Wellness	NAMI Walk Team	CSSD Team for 4 years
Health and Wellness	Autism Walk Team	CSSD Team for 2 years
Community Support	Annual Holiday Adopt-a-Family	24 families adopted over 5 years

Charter Schools in California are allowed to operate for a maximum five-year term. Every five years a charter school is required to go before their authorizer for a public hearing and a public vote to receive another five-year charter term. New terms are based on the Charter School meeting the state eligibility criteria as defined in the California Education Code Section 47605-47608. CSSD was granted five-year renewal terms in 1997, 2002, 2007 and 2012 by unanimous votes from the SDUSD Board of Trustees (Figure 7.4-5). Successful renewals allow CSSD to support its SI of sustainability. CSSD was the first charter school granted in San Diego County and the 28<sup>th</sup> charter school granted in California. Currently, 1,732 charters have been granted in California since 1993. Of the charters granted, 40% have failed, resulting in CSSD being the 17<sup>th</sup> oldest charter school in California.

California School Education Code requires all public schools to be audited by an external auditor annually. For CSSD, this



**Figure 7.4-11 Strategy Results**

Strategic Initiative	Figure Reference
SI 1: Instructional Plan	Fig. 7.1-1-30, 32, 34-38; Fig. 7.2-1-14, 17-19; Fig. 7.3-1-12; Fig. 7.4-9
SI 2: Sustainability Plan	Fig. 7.1-31, 33; Fig. 7.2-15, 16, 20; Fig. 7.4-5, 6; Fig. 7.5-1-6
SI 3: Educational Reform and Innovation Plan	Fig. 7.4-12

is completed by the accounting firm of Wilkinson, Hadley & King (Figure 7.5-5). This is a comprehensive financial audit conducted in accordance with auditing standards generally accepted in the country and the standards applicable to financial audits contained in Government Auditing Standards issued by the Comptroller General of the United States.

The accreditation body for CSSD is the Western Association of Schools and Colleges (WASC). WASC is the accrediting agency for all public and private schools located in California, Hawaii, Guam, American Samoa, Commonwealth of the Northern Marianas, the Republic of the Marshall Islands, the Federated States of Micronesia, and to the American and International schools in Asia and the Pacific. CSSD has earned the longest accreditation term awarded by WASC. CSSD has earned a 6-year term of accreditation three times (Figure 7.4-6). As a comparative, CSSD's competitors A, B and C only received two (A) and three years (B & C), respectively.

CSSD requires all employees to receive a minimal to low risk score on their mandatory Work Styles Behavior Survey and to be cleared to begin employment after thorough background check by the Department of Justice. All new employees receive Standards of Conduct documentation and an Employee Handbook. All CSSD employees are required to sign the Board approved Student-Staff Interaction Policy, Non-Disclosure Agreement, and the CSSD Code of Ethics. Annually, all employees sign the CSSD Code of Ethics prior to the start of the new fiscal year. These key ethics measures ensure members of the CSSD workforce understand their roles in ethical behavior (Figure 7.4-7).

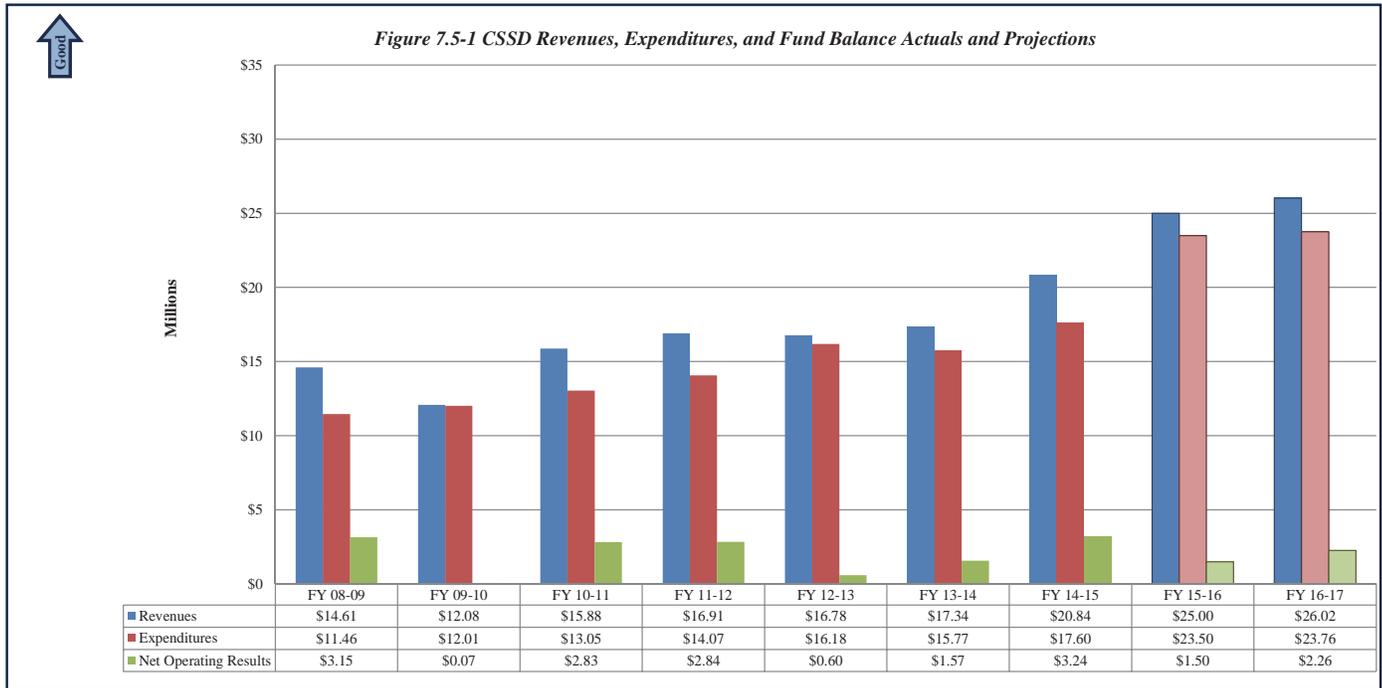
**Figure 7.4-12 Intelligent Risk and Innovation**

<b>Strategic Initiative 1: CSSD INSTRUCTIONAL PLAN</b>			
<b>Tour Location</b>	<b>Learning</b>	<b>Key Innovation</b>	<b>Key SP Action Plan Alignment</b>
Florida	Explored the online, blended learning model and the impact it has on student achievement	Implemented online, blended learning as a key engagement tool for students school-wide; Rolled out InTech to all CSSD RCs and video conferencing capabilities	Improve student achievement data as defined in the PPEP Storybook.
Texas (Austin/San Antonio)	Witnessed well defined, well deployed programs that improve assessment results	Pilot EL-specific resource centers to help increase student achievement and assessment results for significant subgroups	Improve ELA/Math assessment results
Texas (San Antonio)	Explored Intake practices that immediately engage students and parents and that reduce the Intake cycle time	Implemented a customer service training for all SSC support staff and assigned a trainer for Intake Pathways Specialists	Increase Student/Parent Satisfaction/Engagement
Massachusetts (Boston)	Learned of an intense, collaborative PD program specifically tailored to increase student achievement for defined groups	Development of Altus University to support teachers through targeted PD	Provide targeted training to workforce that directly supports student achievement
Illinois (Chicago) Colorado (Denver)	Witnessed highly integrated LT that were tasked to improve processes in an innovative way	Continued to refine the LT to ensure that all key process and stakeholders are represented to create an environment and processes where LT members can collaborate to achieve true innovation	Improve Key Support Process Results
Florida	Explored the online, blended learning model and the impact it has on student achievement	Implemented online, blended learning as a key engagement tool for students school-wide	Implement blended and online learning
<b>Strategic Initiative 2: CSSD SUSTAINABILITY PLAN</b>			
<b>Tour Location</b>	<b>Learning</b>	<b>Key Innovation</b>	<b>Key SP Action Plan Alignment</b>
Louisiana (New Orleans) Washington D.C. New York (New York City)	Learned of a competitive dynamic between the district and charter schools	Retained outside marketing strategist to assist in focusing and deploying CSSD's message through mass media and grassroots campaigns	Develop and implement CSSD marketing strategies to enrollment
<b>Strategic Initiative 3: CSSD EDUCATIONAL REFORM &amp; INNOVATION PLAN</b>			
<b>Tour Location</b>	<b>Learning</b>	<b>Key Innovation</b>	<b>Key SP Action Plan Alignment</b>
18 States (43 Cities)	Obtain information on best practices and failures	Implementation of online, blended learning; Pilot of EL-specific RC, Specific, targeted PD; Collaboration of SD charter schools; Implementation of strategies for engaging communities in education; Retained outside marketing strategist to assist in focusing and deploying CSSD's message through mass media and grassroots campaigns; Rolled out InTech to all CSSD RCs and video conferencing capabilities	Conduct educational reform research by visiting and interviewing charter schools and educational reform movement influencer's nationwide to bring back information regarding effective innovative practices to enhance the organization

CSSD has several results for key measures for fulfilling its societal responsibilities in support of its key communities. The biggest societal responsibility is for CSSD to graduate its students and transform their lives by taking them from potential dropouts to graduates. CSSD's dropout rate continues to decrease (Figure 7.1-1) as its students complete their PPEP

and leave CSSD transformed. Over the past six years CSSD's success with students has directly contributed to the potential increase of over \$149,000,000 of local taxable dollars (Figure 7.4-8).

CSSD supports its community by focusing its operations on waste reduction, resource conservation, health and wellness,



community outreach support (Figure 7.4-9).

Accomplishment of our SI AP over the past five years correlates to the success of the SP and overall organizational performance in achieving its CC of *Transforming Lives*. In the last four years the AP completion rate has increased significantly (Figure 7.4-10).

CSSD’s results are segmented by SI and cross referenced as a key to assist the evaluation process for Examiners (Figure 7.4-11).

The CEO led National Educational Reform Tour is CSSD’s best process for taking Intelligent Risks and is reflective of the innovative culture. Figure 7.4-12 cross references examples of toured cities and direct innovations at CSSD.

**7.5 Budgetary, Financial and Market Results**

**7.5a Budgetary, Financial and Market Results**

**7.5a(1)** Figure 7.5-1 illustrates the seven-year actuals and two-year projections for revenues, expenditures, and net operating results.

CSSD’s key measures and indicators for budgetary and financial performance support the strategic initiative of sustainability to remain fiscally solvent. In addition, CSSD’s strong fiscal management allows it to accomplish its CC and support its Mission and Vision, and the Basic Value of using business principles in managing the school. The success of CSSD’s instructional program and long-term sustainability depends on strong financial planning and fiscal stewardship. Budgetary results contribute to student-centered processes by providing the resources necessary to operate the school and attain continuous improvement. CSSD is focused on how effectively funds are used, identifies future financial needs and gauges the impact of today’s decision on future needs or goals. CSSD maintains financial stability through prudent monitoring of budgeted expenses and forecasted revenues to ensure adequate reserves are built and maintained when closing the fiscal year

(FY). Actual revenues and expenditures are regularly compared by the CBO with the adopted budget quarterly through OPMR reviews and revisions are made as necessary. Additionally, financial performance for each resource center is tracked quarterly, evaluated, and shared with the LT. SL keep abreast of new legislations that impact funding which is shared through quarterly LT meetings and monthly Strategic Sustainability meetings.

Due to California’s fiscal crisis in 2008, the state adopted two fiscal measures that affected all charter schools – the deferment of state apportionments and the cut in rates of per pupil funding. State apportionments have been deferred for several years. This means that state apportionments are not paid until the succeeding fiscal year. In FY 2011-2012, deferment was about 40% of the funding. The combined decrease in the rates of funding for four fiscal years, which started in FY 2008-2009 through FY 2012-2013, was 43.14%. Although CSSD experienced a steep decrease in funding due to the state fiscal crisis, CSSD managed to continuously increase its revenue by a sharp focus on enrollment and ADA as well as availing of application based funding opportunities as shown in Figure 7.5-1.

CSSD dealt with the state fiscal challenges by observing effective financial management such as cash flow management, budget controls, revenue enhancement and expenditure controls. CSSD revisited multi-year projections and cash flows, curtailed expenditures and reassessed priorities to support the major initiatives of the school which directly support student achievement and enhance organizational capabilities.

In 2010, the CSSD Board of Directors adopted a reserve policy to establish and maintain three levels of reserve funds that include the General/Operation Reserve Fund, Reserve for Economic Uncertainties, and Contingency/Strategic Fund. These funds must remain unencumbered and uncommitted at a level relative to the annual operating budget and the historical costs of operating and maintaining the organization. The Reserve Policy allows CSSD to continue to operate during difficult financial times and to maintain the current level of operations while the school addresses unexpected challenges

**Figure 7.5-2 Comparative Revenue, Expenditures and Net Operating Results FY 2009-10 through 2013-14**

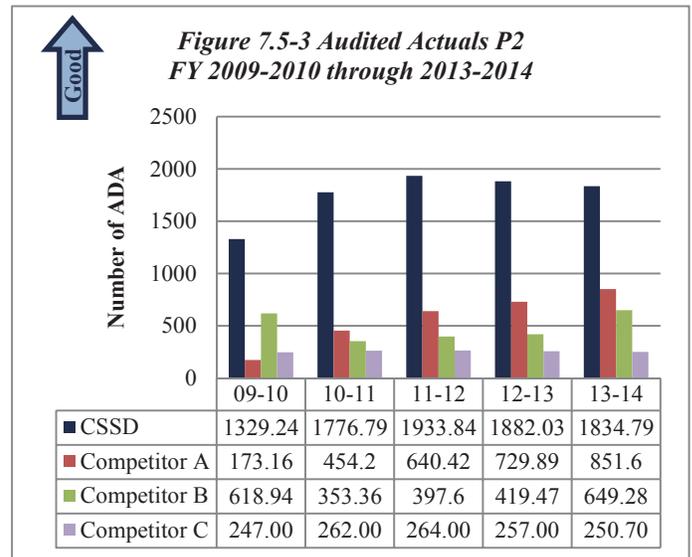
School		Revenue	Expenditures	Net Operating Results
FY '09-'10	CSSD	\$12,075,283	\$12,012,616	\$62,667
	Competitor A	\$1,348,837	\$1,335,885	\$12,952
	Competitor B	\$4,422,107	\$3,865,707	\$556,400
	Competitor C	\$1,965,382	\$2,141,499	-\$176,117
FY '10-'11	CSSD	\$15,883,182	\$13,052,486	\$2,830,696
	Competitor A	\$3,635,095	\$3,032,454	\$602,641
	Competitor B	\$2,976,824	\$2,653,022	\$323,802
	Competitor C	\$2,194,367	\$2,290,999	-\$96,632
FY '11-'12	CSSD	\$16,905,913	\$14,067,464	\$2,838,449
	Competitor A	\$4,954,621	\$4,539,803	\$414,818
	Competitor B	\$2,999,456	\$2,836,578	\$162,878
	Competitor C	\$2,188,607	\$2,201,397	-\$12,790
FY '12-'13	CSSD	\$16,776,376	\$16,177,999	\$598,377
	Competitor A	\$5,663,607	\$5,838,468	-\$174,861
	Competitor B	\$3,061,077	\$3,077,972	-\$16,895
	Competitor C	\$2,278,852	\$2,277,159	\$1,693
FY '13-'14	CSSD	\$17,340,896	\$15,771,753	\$1,569,143
	Competitor A	\$7,180,126	\$7,142,036	\$38,090
	Competitor B	\$4,868,874	\$5,335,518	-\$466,644
	Competitor C	\$2,523,656	\$2,112,153	\$411,503

such as the state deferrals of apportionments.

CSSD's major key financial performance indicator is to have revenues exceed expenditures at the end of the fiscal year and to build reserves in order to support the strategic initiatives. Figure 7.5-2 shows how CSSD's revenues and expenditures compared to those of other competitor ASAM charter schools in San Diego County that serve the same grade levels. This figure includes total revenues generated, total expenditures and the net results of operations for each school. CSSD's net result of operations were significantly more positive because of regular evaluations of the budgetary and actual financial performance, conducting regular and multiple year's financial forecasting to project quantitative impact of trends and changes in the operating environment and future operations.

The state of California funds school districts and charter schools based on student attendance, also known as Average Daily Attendance (ADA). ADA is calculated at traditional schools by dividing the total number of days of student attendance by the number of days of school taught. Unlike traditional schools, as an independent study program, ADA for CSSD is measured by completion of "work product" or academic assignment. Figure 7.5-3 depicts comparative ADA for CSSD and competitors in San Diego County with the same educational program. In analyzing the trends for the last 10 years, CSSD's ADA increased by 104% which is attributed to consistent and regular evaluation of market performance and market share; tapping into new market positions and effective collaboration amongst the LT in analyzing enrollment and ADA results.

In 2001, Senate Bill 740 ("SB 740") commonly referred to as the NonClassroom-Based (NCB) Charter Funding Determination was passed. California Education Code (EC) sections 47612.5 and 47634.2 established the eligibility requirements for apportionment funding for charter schools that offer NCB instruction. This bill prohibits a charter school from receiving funds, until a determination of funding is made



**Figure 7.5-4 SB 740 Funding Determination**

Fiscal Year	Term	Percentage of Funding	
2001-2002	1 year	2001-2002	100%
2002-2003	3 years	2003-2005	100%
2005-2006	5 years	2006-2010	100%
2010-2011	4 years	2011-2014	100%
2013-2014	4 years	2015-2018	100%

possible by the State Board of Education (SBE). Pursuant to 5 CCR Section 11963.4 (a), a Nonclassroom-Based charter school may qualify for 70 percent, 85 percent, 100 percent full funding or may be denied. To qualify for 100 percent funding, a NCB charter school must meet the following criteria: At

**Figure 7.5-5 Audit Results for 5 Fiscal Years (FY 2009-2010 through FY 2013-2014)**

School	Audit Findings	Notes to Financial Statements	Reconciliation of Unaudited Actuals to AFS	Comments
CSSD	None	None	None	
Competitor A	None	Yes	None	<ul style="list-style-type: none"> <li>From FY 10-11 to FY 13-14 Cash Bank Balances Exceeded the FDIC Insured Coverage denoting risk in funds</li> </ul>
Competitor B	None	None	Yes	<ul style="list-style-type: none"> <li>FY 11-12 to FY 13-14 Increase (decrease) in net assets</li> <li>FY 09-10 Audit report did not include reconciliation pursuant to State Audit guidelines</li> </ul>
Competitor C	Yes	Yes	Yes	<ul style="list-style-type: none"> <li>FY 13-14 Inadequate Support for ADA reported for Non-Classroom Based Attendance</li> <li>FY 09-10 Cash Bank Balance Exceeded the FDIC Insured Coverage demonstrating risk in funds</li> <li>FY 10-11 Asset Balances were Understated</li> <li>FY 09-10 to FY 11-12 No Annual Financial &amp; Budget Reports submitted pursuant to regulatory requirements for charter schools</li> <li>FY 13-14 Adjustment for oversight fee accrual</li> </ul>

least 40 percent of the school’s public revenues are to be spent on salaries and benefits for all employees who possess a valid teaching certificate; and at least 80 percent of all revenues are to be spent on instruction and instruction related services; and the ratio of average daily attendance (ADA) for independent study pupils to full-time certificated employees does not exceed a pupil-teacher ratio of 25:1 or the pupil-teacher ratio of the largest unified school districts in the county or counties in which the charter school operates. *Figure 7.5-4* depicts the trends of the funding determination for CSSD since the inception of the SB 740.

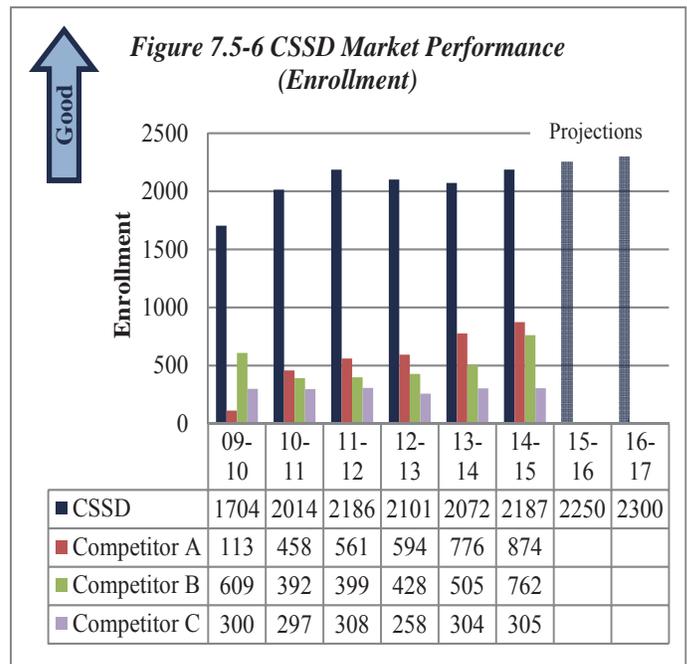
The CSSD Board oversees the completion of an annual audit of the schools’ financial affairs. Each audit shall be made by a Certified Public Accountant (CPA) selected from a directory of CPAs deemed by the State Controller as qualified to conduct audits of Local Educational Agency (LEA) published by the State Controller. The audit is conducted in accordance with auditing standards generally accepted in the USA and the standards applicable to the financial audits contained in the Government Auditing Standards, issued by the Comptroller General of the USA. Auditing is performed to obtain reasonable assurance that the financial statements are free of material misstatement and it includes assessing the accounting principles used and significant estimates made by management, as well as, evaluating the overall financial statement presentation.

Notes to the financial statements in an audit are an integral part of the statement of financial position and the statement of activities.

In 2003, CSSD was incorporated and attained independence from its authorizing district (SDUSD). Since incorporation, CSSD’s operational and financial audits are consistently clean with no audit findings.

*Figure 7.5-5* depicts how CSSD’s audit results since 2009 compare to competitors.

**7.5a(2)** California Basic Education Data System (CBEDS) is an annual data collection system administered by the state of California every October. While CSSD’s total number of students served throughout the year (July through June) is more than 4,000, the state designates the first Wednesday of October



as a date in which a snapshot in time is taken for enrollment (*Figure 7.5-6*).

CSSD chooses to compare CBEDS data because competitor data is readily available. CBEDS numbers are reported on DataQuest, which is the California State Department of Education’s database for public school reporting. Reports include accountability data, test data, enrollment counts, graduation rates, dropout rates, course enrollments, staffing, and data regarding English Learners.

CSSD’s highest volume of students typically enroll between the beginning of the Spring traditional semester and summer. The summer months are the highest time of enrollment for CSSD. To support SI 2, Goal 3 (*Figure 2.2-1*), CSSD has increased mass media marketing and grassroots marketing campaigns, the CSSD CBO projects that enrollment will increase by 113 students over the next two years at the CBEDS date.

