

Building Excellence

How Helping Charters Access Facilities
Can Improve Opportunity for Idaho Kids



Kelly Robson and Juliet Squire







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Foreword

Terry Ryan and Angel Gonzalez, Bluum

Finding appropriate instructional space is a perennial challenge for schools of choice which—unlike public district schools—do not have access to public bond markets or public tax levies. Affordable facilities are a serious inhibitor to the growth of the state’s charter public schools, especially start-up charter schools that might bring different programs and learning opportunities to Idaho’s children and families.

This is especially frustrating for three reasons. First, Idaho’s brick-and-mortar charter schools work. On 2015–16 state achievement tests, five of the state’s top 15 public schools are charters, while the top three schools in mathematics are all charters. Second, there are more than 6,000 Idaho children on charter school waitlists. Third, the National Center for Education Statistics projects that Idaho will add upwards of 22,000 new preK–12 students by fall 2022.¹ Charter public schools can help add new high-quality seats for the state’s growing number of new students.

While not equalizing funding for successful charter schools, Idaho’s lawmakers have in recent years worked to improve the facilities landscape for charter public schools. In 2013 Governor Otter signed legislation that created a per-pupil facility allowance for public charter schools. This amounts to about \$335 per pupil in 2016–17. While this is much appreciated and helpful for Idaho’s charter schools, there are four states and one city that provide more than \$1,000 per pupil (Arizona, Georgia, Minnesota, New York, and Washington, D.C.) and four more that provide funding between \$351 and \$999 per pupil (California, Indiana, Massachusetts, and New Mexico).² In 2014, Idaho lawmakers passed a guarantee fund that will reduce the cost of borrowing for charter schools with a history of academic and financial success.

Despite this recent legislative support, and despite their ongoing academic success and the demonstrable demand for high-quality charter schools, the state's current and future crop of charter schools struggle to finance and maintain facilities that work for their students.

To document the financial challenges facing Idaho charter schools, and to provide policy ideas and recommendations for improvement, we reached out to the nonprofit education research group Bellwether Education Partners. Bellwether has done great work with the Rural Opportunities Consortium of Idaho (ROCI) and the J.A. and Kathryn Albertson Family Foundation. Their mission is to help “education organizations become more effective and achieve dramatic results, especially for high-need students.” Bellwether’s work is highly regarded across the country. They simply tell it like it is using data and the words of actual practitioners. This is precisely what Idaho’s public schools (charter and district alike) need help doing more of in the coming months and years.

In this report, Bellwether provides an overview of how charter school facilities are funded in Idaho. Even more insightful is their comparison of Idaho charter facility funding to that of traditional district schools. The numbers are stark. For example, the renovation cost for Jerome High School was \$19,310 per student. The local charter public school, by way of comparison, spent only \$2,634 per student for its improvements.

But even this level of investment comes at great costs for charters, given the fact that these dollars largely come out of their basic operating budget. Not surprisingly, when Bellwether surveyed 26 of the state’s brick-and-mortar charter school leaders (representing 65 percent of such schools in Idaho), fully half of the respondents “agreed or strongly agreed that they had to make ‘substantial compromises to what we wanted’ when securing a facility for their school.” Bellwether does an excellent job of sharing what some of these compromises are and what they mean for charter public students and their schools.

When it comes to recommendations for improving the Idaho charter school facility landscape, the Bellwether research team provides three approaches that involve not just spending new money, but also seeking to do things differently. For example, their first recommendation suggests, “Idaho’s policymakers may consider ‘right of first refusal’ laws, which numerous states have used to require public agencies to sell or lease taxpayer-funded facilities to charter schools before selling it to other parties.”

Bluum is committed to helping create new, high-performing seats in schools that are ready, willing, and able to serve the state’s growing and increasingly diverse student demographic. Though we have set the goal of 20,000 new seats in innovative schools of choice by 2024, we realize trying to come up with facilities solutions for current and future charter schools is a pivotal challenge.

Over the last three years we have worked closely with the J.A. and Kathryn Albertson Family Foundation and Building Hope, a national nonprofit dedicated to helping charter schools develop high-quality facilities, to assist the expansion of some of the best charter public schools in the state. Through this work, top charter schools like Compass Public Charter School in Meridian, Idaho Arts Charter School in Nampa, Idaho Distance Education Academy/GEM Prep Academies in Pocatello and Nampa, North Idaho STEM Charter Academy in Rathdrum, Connor Academy in Pocatello, Upper Carmen Public Charter School in Salmon, and Sage International School in Boise have all been able to expand the number of students they serve. Because of this work there are now more than 1,500 children in a public school of their choice who otherwise wouldn't have that opportunity. There is, however, much more work to be done.

We are thankful to the Bellwether team, especially the top-flight analysts Kelly Robson and Juliet Squire, who led this important work. We are also very thankful to the 26 charter public school leaders who took the time to participate in the school survey and to lend their voices to this important issue.

Executive Summary

Finding and financing facilities is one of the major challenges facing charter public school leaders across the nation. This has been a particular challenge for charter leaders in Idaho, where charter public schools receive little funding for facilities. Without access to facilities, charter schools struggle to open and expand to serve more kids.

To better understand charter leaders' experiences acquiring facilities, we conducted a survey of all charter school leaders in the state of Idaho. The leaders of 26 brick-and-mortar charter schools responded, representing 65 percent of all such charter schools in the state.

Our survey gathered a number of facilities-related data points, including the square footage and seat capacity of schools' current facilities, monthly and annual facilities-related expenditures, and whether charter school facilities have amenities like auditoriums, gyms, and libraries. We also asked charter leaders about the specific challenges they face as they search for and finance property for their schools.

This survey data, coupled with follow-up interviews with six school leaders and our analysis of publicly available data and reports, surfaced four key findings:

- 1 Limited access to financing is a major barrier to securing an adequate facility.** Charter leaders report that accessing financing is one of the most significant barriers they face in purchasing a facility. The existing per-pupil facilities allocation is insufficient to cover all facilities-related costs; instead leaders must rely on operating dollars.

- 2 Charter leaders struggle to find suitable properties and often make significant tradeoffs.** Finding an existing facility that could be converted into a school or identifying available property on which to build a school is monumental task for Idaho’s charter school leaders. Most have to make significant tradeoffs in order to secure a building.
- 3 Inadequate facilities funding makes it more challenging for charter schools to provide the educational programming they envision.** The financial burden of their facilities arrangements prevents school leaders from using their resources for other programs or services.
- 4 Charter schools are able to construct and renovate facilities at a fraction of what districts spend.** Given the financial constraints they face, charter leaders are doing extraordinary work securing facilities for their schools. Limited access to facilities and facilities funding imposes a strong discipline that proves a useful comparison to the practices of traditional school districts—which spend much more per-pupil for construction projects.

Based on these findings, we make three recommendations to the Idaho legislature to ensure charter public schools have more equitable access to facilities:

- 1 Give charter schools the right of first refusal or free or low-cost access to vacant, taxpayer-funded properties.** Charter school leaders ought to have low-cost access to vacant, taxpayer-funded facilities in their respective towns. This includes access to vacant school buildings as well as facilities owned by the state or municipality.
- 2 Allow charter schools to be included in local district bonds and levies.** In order to provide charter schools with access to local funding sources, school districts must be encouraged to include charter schools’ facilities needs alongside the district’s needs in local bonds and levies.
- 3 Increase funding for existing programs.** Both the state per-pupil facilities allocation and the Public Charter School Debt Reserve offer some facilities support to charter schools. However, the current per-pupil facilities allocation is less than half of what charter leaders report spending on facilities. Existing funding for the Public Charter School Debt Reserve can support only a single charter school. Funding for both must be increased to provide meaningful facilities support for charter schools.

Introduction

Like traditional district public schools, charter schools are free, public schools, open to all children, and dedicated to educating Idaho's K-12 students. They are taxpayer funded, publicly accountable, and provide a public good. A significant portion of the state's charter schools are also some of the state's highest-performing public schools on both the state's annual tests and the SAT. So it is troubling that a child in a charter public school receives less public support than a child enrolled in a traditional district school.

Nationwide, local and state capital funding programs provide modest to meager facilities support to charter schools. While many states have implemented policies and programs aimed at reducing these inequities, the approaches tend to be partial solutions rather than comprehensive efforts to ensure students attending charters have access to appropriate facilities.

Current Idaho law treats public school students who attend charters differently than their peers attending traditional district schools.

Unfortunately, Idaho is no exception. Current Idaho law treats public school students who attend charters differently than their peers attending traditional district schools. This makes the launch and operation of high-performing charter schools in Idaho all the more challenging. Idaho does not provide charter schools equal access to public dollars for facilities, nor does it provide charters with access to publicly owned facilities. Charter schools finance facilities through tight operational dollars (around \$6,000 a student), and many operate in lower-quality facilities compared to their district neighbors.³

In recent years, Idaho legislators have adopted some provisions to help charter schools access financing for facilities. While these provisions are helpful and appreciated, many barriers remain. Charter school leaders face continued challenges in financing facilities.

The following analysis describes the current facilities funding landscape for Idaho's public schools, including the different policies and programs in place to help finance both district and charter public school facilities. It then presents the findings from a survey of charter school leaders, which offer important insights into the facilities challenge and how charter school leaders are making do with creative but suboptimal arrangements. Finally, it concludes with a series of recommendations for how Idaho policymakers can help improve facility options for Idaho's current and future public charter school students.

Current State of School Facilities Funding

Currently, Idaho's school districts have access to four main funding streams to help finance facilities. These four programs give traditional school districts access to an average of roughly \$1,445 per pupil specifically to cover the construction, maintenance, and operation of school facilities.⁴

Of these four programs, only one (the smallest, about \$12 per pupil) is available to charter schools. Because charter schools do not have access to other traditional facilities funding streams, in 2013 the state began providing an additional per-pupil facilities allocation to charter schools. Tables 1 and 2 below summarize which of the following state and local funding streams are available to charter schools.

Table 1 > School District Facilities Funding Streams

Program Name	Description	State Appropriation	Average Per-Pupil Amount ⁵	Available to Charters?
Local Bonds and Levies	<p>Under Idaho law, school districts are political subdivisions of the state and have the power to issue bonds and levy taxes.⁶ When a district needs to construct a new school or renovate an existing building, it is able to call an election in which the community can vote on a proposed tax levy to cover the cost of a facility.⁷ If voters approve the levy, the district will collect the additional property taxes and can use those funds for the designated tasks.</p> <p>School districts are also able to issue bonds in order to finance the construction or renovation of school facilities. Like levies, voters must approve bond issues. If approved, the district may sell bonds to investors; the district then uses the funds to renovate or construct facilities. The district must pay back the bonds, with interest, to the bondholders.</p>	\$359 million raised statewide in 2015 ⁸	\$1,321	No
State Lottery Funds	<p>State statute requires that the state lottery allocate three-eighths of its revenue to a school district building account.⁹ The state then distributes these funds to school districts on a per-capita basis to offset facilities costs.¹⁰</p>	\$18 million ¹¹	\$66	No
Bond Levy Equalization Program	<p>Bonds are essentially loans from the public. Like any loan, a district must pay back the principal, with interest. In Idaho, the state allocates funds to help school districts make these payments.¹²</p> <p>The amount of aid a district receives through this program depends on its economic conditions. Poorer districts (those with less taxable property, high unemployment, etc.) receive more aid. The economic conditions are used to calculate a “value index.” Depending on the district’s value index, the state may pay between 10 and 100 percent of a district’s obligations on locally issued bonds.</p>	\$12.5 million ¹³	\$46	No
School Facilities Maintenance Match	<p>Under Idaho law, traditional school districts and charter schools must allocate annually at least two percent of each building’s replacement cost to cover maintenance and repairs.¹⁴ The state provides districts a proportion of these funds, based on a calculation of each district’s value index (see Bond Levy Equalization Program above) and the replacement value of the facilities. If the amount determined by this calculation is less than the district’s distribution from the state lottery funds, the state will pay the school or district the difference.¹⁵</p>	\$3.5 million ¹⁶	\$12	Yes
Total		\$393 million	\$1,445	

Table 2 > Charter School Facilities Funding Streams

Program Name	Description	Average Per-Pupil Amount
State Per-Pupil Facilities Allowance	In 2013 the state passed legislation requiring the state department of education to distribute facilities funds to charter schools on a per-pupil basis. To determine the amount of per-pupil facilities funding to provide to charter schools, the state calculates the average per-pupil funding from district bonds and levies. Statute dictates that charters receive no less than 20 percent and no more than 50 percent of this average. Initially (for fiscal year 2014), charter schools received 20 percent of the average levies, or \$121.91 per student. ¹⁷ The amount increased to 30 percent for fiscal years 2015 and 2016, or \$335 for the 2016–17 school year. Moving forward, the percentage of levied funds charter schools receive can increase and decrease depending on the total appropriation of state funds for the education support program. ¹⁸	\$335 for SY 2016–17
School Facilities Maintenance Match	Charter schools have access to the School Facilities Maintenance Match program and associated funding, as described for district schools above.	\$12
Total		\$347

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Because there is no local facility funding and meager state facility funding available, charter leaders have used other means to fund their facilities. Some charters have relied solely on operating dollars. Others have been able to access financial support for facilities through tax-exempt bonds issued by the Idaho Housing and Finance Authority (IHFA) and/or private philanthropy.

In 1997, the state legislature authorized the IHFA to issue tax-exempt bonds on behalf of nonprofit organizations, including charter schools. The schools themselves are responsible for securing a bank or investor to purchase the bonds prior to receiving approval from the IHFA, but the IHFA helps facilitate connections between school leaders and potential investors. Since 2002 the IHFA has completed more than a dozen bond issues for charter schools across the state, totaling nearly \$78 million.¹⁹

Philanthropic investments from local foundations, especially the J.A. and Kathryn Albertson Family Foundation (JKAF), have also enabled some high-performing charter schools to expand or acquire facilities. JKAF has provided millions of dollars in grants to support charter school expansions, including facility costs. For example, in 2009 JKAF approved nine charter schools for expansion grants ranging from \$75,000 to \$125,000.²⁰ Moreover, in 2014 JKAF helped bring Building Hope to Idaho. Building Hope is a nonprofit organization that specializes in helping charter schools acquire facilities; as of December 2015, Building Hope had invested nearly \$8.5 million in loans and credit enhancements to charter schools throughout Idaho.²¹

In addition, in 2015, the legislature created the Public Charter School Debt Reserve.²² Traditional financing arrangements require charter schools to set aside cash in a debt reserve fund, in case the school cannot make payments. Eligible charter schools may apply to the IHFA (which oversees the debt reserve program), and, if approved, use this debt reserve to help obtain favorable financing. This allows schools to either tie up less cash in the reserve fund or to borrow less—ultimately saving charter schools tens of thousands of dollars over the life of a loan. The legislature has appropriated \$750,000 to the debt reserve. Unfortunately, this program only applies to charter schools with demonstrated academic and financial success over several years. New-start charter schools are not eligible.

Charter public schools in Idaho receive significantly less public facilities funding than district public schools. As a result, charter schools have to make trade-offs between spending on facilities and spending on their staffing (e.g. teachers, teacher aides, etc.) and supports (e.g. technology). Charter leaders often make significant compromises when identifying a suitable facility and in financing its construction or renovation. In some cases, these compromises can make it difficult for charter schools to offer the robust educational programming they desire, let alone amenities like gymnasiums and libraries.

In Their Words: Charter School Leaders Describe Their Schools' Facilities Arrangements

Building Hope Builds a Success Story: Sage International School

The Idaho Public Charter Commission approved the charter of Sage International School in 2009, and the school opened in 2010 in Boise. Sage is a K–12 school offering the International Baccalaureate program to its students. It is also one of the largest charter schools in Idaho, with a capacity of nearly 1,100 students and a 97,000-square-foot facility.

When Sage opened its doors in 2010, it did so as a K–8 school in a leased building of approximately 11,000 square feet. By its second year, with support from the J. A. and Kathryn Albertson Family Foundation (JKAF), Sage expanded to serve grades 9–12 in a second facility in downtown Boise. School leaders worked to execute a lease-purchase agreement with the owners of their first facility, including the original leased building, a vacant mall next door, and an empty plot of land where a drive-thru bank had been torn down.

With the help of Building Hope, the generosity of JKAF, and the investment of a local bank, Sage International School was able to purchase the three parcels of land and remodel them in phases. According to Sage's business administrator, a combination of luck and support from Building Hope made the process a success: "We got a great interest rate thanks to Building Hope. This is helping us save about \$300,000 per year, which is savings we can put into our kids. The private bank wouldn't have come to us without Building Hope." This fall Sage opened its doors for its entire K–12 student body on a unified campus.

Current State of Charter Schools' Facilities

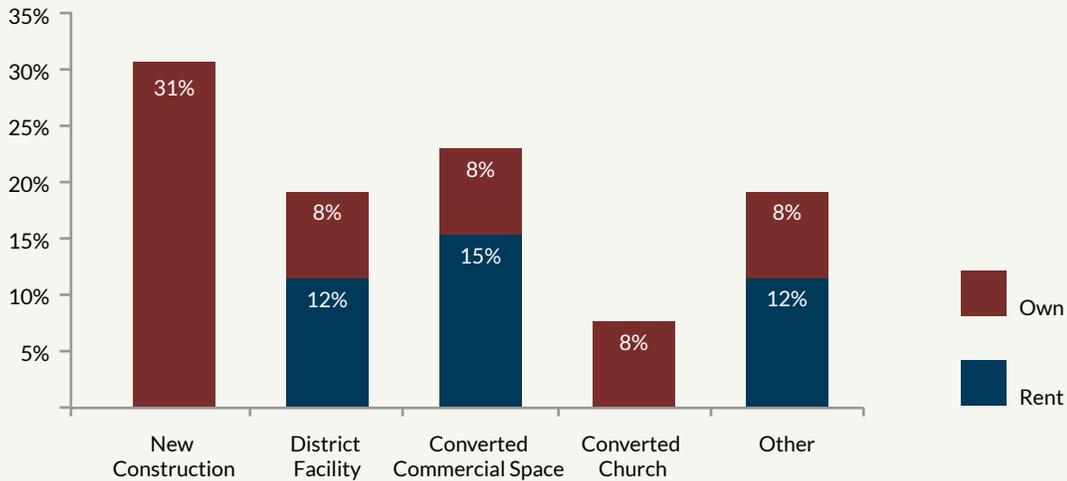
To better understand the facility challenges faced by charter school leaders in Idaho, we invited them to participate in a survey, and conducted follow-up interviews with six leaders across the state. In all, 27 charter school leaders completed the survey, 26 from brick-and-mortar schools and one from a virtual school. While some virtual schools do have physical locations where students can go to take assessments or get support on their coursework, due to the sole response from a virtual school leader, the analysis that follows focuses entirely on the information reported by the 26 brick-and-mortar school leaders (representing 65 percent of such schools in Idaho).

Because charter schools rarely have access to financing to construct a school in which to launch their operations, charter school leaders must make other facilities arrangements for their schools.

Because charter schools rarely have access to financing to construct a school in which to launch their operations, charter school leaders must make other facilities arrangements for their schools. Figure 1 below highlights the most common types of facilities in which charter schools operate: new construction, district facilities, converted commercial space, and converted churches. However, many have found “other” solutions, such as renting classroom space in an operating district building, utilizing portable classroom trailers, or having multiple types of facilities.

Figure 1

Charter School Facilities Arrangements



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Annually, charter schools spend an average of more than \$700 per pupil on school facilities. Table 3 summarizes the average costs across all schools for which data were reported.²³ Some charter schools' arrangements are better than others, but all have costs and benefits. For example, schools that own their facilities have greater year-to-year stability both in terms of monthly costs (since they do not have to worry about increasing rent payments) and location (since any moves are solely at the discretion of school leaders). Depending on the nature of the rental agreements, schools that rent their facilities may face year-to-year instability, as rent costs may increase annually and landlords could choose not to renew a lease and force a school to find a new facility.

When school leaders decide to undertake either new construction or significant renovations to an existing facility, there are significant upfront costs that they must plan for, and obtaining financing at reasonable rates can be a real impediment. But with these arrangements, school leaders have a great deal of flexibility over how to design their schools' facility, ensuring it meets the needs of their students. However, if the facility is rented, school leaders must carefully consider the long-term costs of renovations, as they are investing capital in property owned by someone other than the school.

Regardless of the specific facility arrangements, charter schools are often paying a pretty penny for them—even for those with significant drawbacks. Schools that own their facilities spent an average of \$5.1 million on them (in 2016 dollars). Across all facilities,

rented or owned, charter leaders report spending an average of \$324,964 annually on all facilities-related expenditures, including rent or mortgage, maintenance, and repair costs—approximately \$707 per seat per year²⁴ (see Tables 3 and 4).

Table 3 Average Charter School Facilities Costs

Average cost of facility (owned facilities only) ²⁵	\$5.1 million
Average monthly payment (rent or mortgage) ²⁶	\$18,123
Average annual facilities-related expenditures ²⁷	\$324,964
Average annual facilities-related expenditures per seat (at capacity) ²⁸	\$707

Table 4 Average Charter School Facilities Specifications

Average square footage ²⁹	34,731
Average seat capacity ³⁰	446
Average square feet per seat ³¹	78

Because many charter schools open with one or two grades and then expand gradually, enrollment is often lower than a building’s capacity. In 2015–16, charter schools had an average of 417 students enrolled, for a per-pupil cost of \$751 (see Table 5).

Table 5 Average Charter School Facilities Specifications Based on 2015–16 Student Enrollment

Average student enrollment ³²	417
Average square feet per student ³³	87
Average annual facilities-related expenditures per enrolled student ³⁴	\$751

Charter schools that own their facilities spend significantly more per pupil, both on their monthly mortgage and annual facilities-related costs, than do charter schools that rent their facilities (see Table 6). However, owned facilities are on average nearly twice as large, and hold nearly twice as many students, as rented facilities.

There are several possible explanations for these differences. When schools purchase a facility, they are making a long-term investment in their school. As a result, leaders may choose to purchase or build a facility that can accommodate the charter’s projected enrollment growth for five, 10, or even 20 years into the future. That means that there may be several years in which a school’s facility is larger than its current needs. In these intervening years, the per-pupil facilities costs will be much higher, as fewer students’ per-pupil dollars are spread out over the fixed cost of the facility. As school enrollment grows over time, average per-pupil facilities spending will decrease.

Schools that rent their facilities, on the other hand, may have an easier time moving to a new facility to accommodate growth as needed, meaning that the size of rented facilities may grow more proportionally to enrollment growth.

A second possible explanation is that schools with larger enrollments can better afford to purchase a facility, and therefore they simply need larger facilities than do smaller schools that rent their buildings.

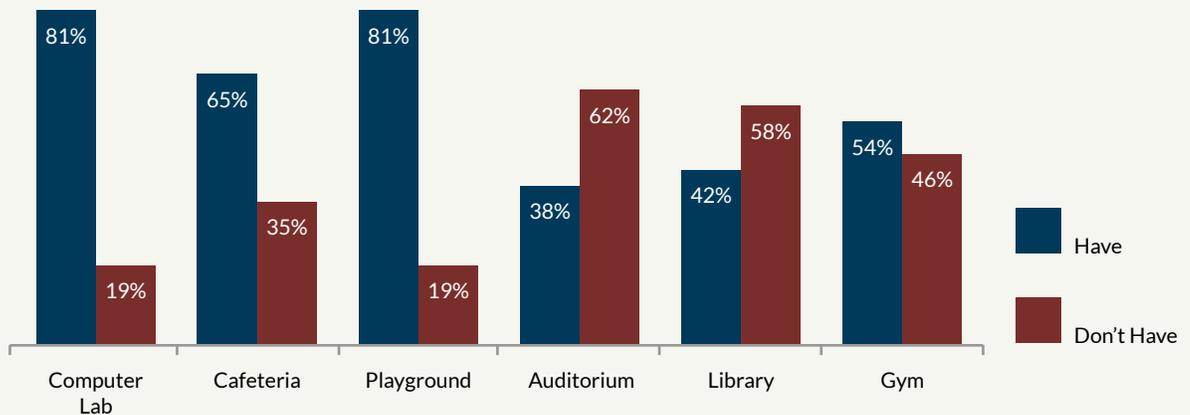
Table 6 Costs of Rented Versus Owned Charter Facilities

	Rented Facilities	Owned Facilities
Average square feet ³⁵	21,210	42,337
Average seat capacity ³⁶	288	545
Average student enrollment ³⁷	253	519
Average monthly payment (rent or mortgage) ³⁸	\$8,200	\$23,793
Average total annual facilities-related expenditures ³⁹	\$143,091	\$402,910
Average annual facilities-related expenditures per seat (at capacity) ⁴⁰	\$554	\$772
Average annual facilities-related expenditures per student (2015–16 enrollment) ⁴¹	\$644	\$796

We also asked school leaders to identify what amenities their school facilities have, including whether or not the building has a computer lab, cafeteria, playground, auditorium, library, or gymnasium. These amenities are important components of a school’s educational and extracurricular programming. Playgrounds and gymnasiums make it possible for a school to offer on-site physical education classes. Computer labs enable schools to provide students with technology courses or access to online platforms. Auditoriums allow schools to gather their students in a single location for awards ceremonies or school-wide assemblies.

The majority of charter school leaders indicate that they have a designated space for a computer lab, a cafeteria, and a playground. However, just 54 percent have a gymnasium and fewer than half of schools have an auditorium or library space (see Figure 2).

Figure 2 > Charter Facility Amenities



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It's difficult to imagine a district putting forth a levy or bond issue to build a school that lacks a gymnasium, library, or cafeteria. Yet such concessions are exactly what charter school leaders often make.

It's difficult to imagine a district putting forth a levy or bond issue to build a school that lacks a gymnasium, library, or cafeteria. Yet such concessions are exactly what charter school leaders often make. They are creative in their solutions but developing and managing alternative arrangements is nonetheless a distraction for school leaders and staff.

And absent amenities, like gymnasiums, charter school leaders make compromises to ensure they offer a comparable (and legal) education to their students. Fully half of respondents agreed or strongly agreed that they had to make “substantial compromises to what we wanted” when securing a facility for their school. As one school leader commented, “[We have] no gym, no commons area, [the] play area development [is] still in progress, [and it is] hard to implement singing and drama.”⁴²

Ensuring charter schools have access to adequate, equitable school facilities comes down to more than just size and cost. School leaders must have a facility that can accommodate robust academic programming—including electives like gym, art, and music.

Key Findings

The current inequity between facilities funding for charter public schools and district public schools has created a number of challenges for charter school leaders. Our research, including the survey of school leaders, follow-up interviews with six leaders, and a review of published reports, legislation, and publicly available data, offers four key findings. Charter school data is self-reported through the survey and district school data is based on what is publicly available through the Idaho state Department of Education, school district websites, and other online sources such as local newspaper articles.

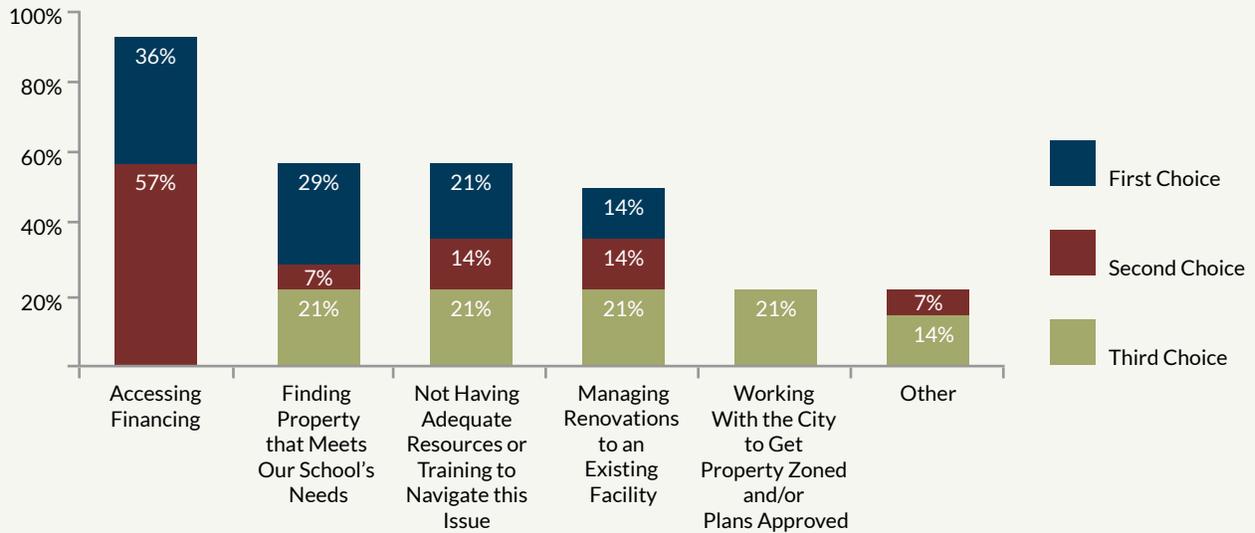
Finding 1: Limited Access to Financing Is a Major Barrier to Securing an Adequate Facility

Charter schools, no matter how fiscally responsible, often have a difficult time saving enough money for a significant down payment. This means that they generally need to finance close to 100 percent of the cost of the facility. In addition, charter schools typically are seeking 15- or 30-year mortgages, despite the fact that their charters are only for five years. Both of these elements increase risk to the lender, and so traditional investors and banks are often skeptical of investing in charter school facilities.

In fact, accessing financing is consistently one of the top challenges charter schools face in purchasing and owning a school facility (see Figure 3).⁴³

Accessing financing is consistently one of the top challenges charter schools face in purchasing and owning a school facility.

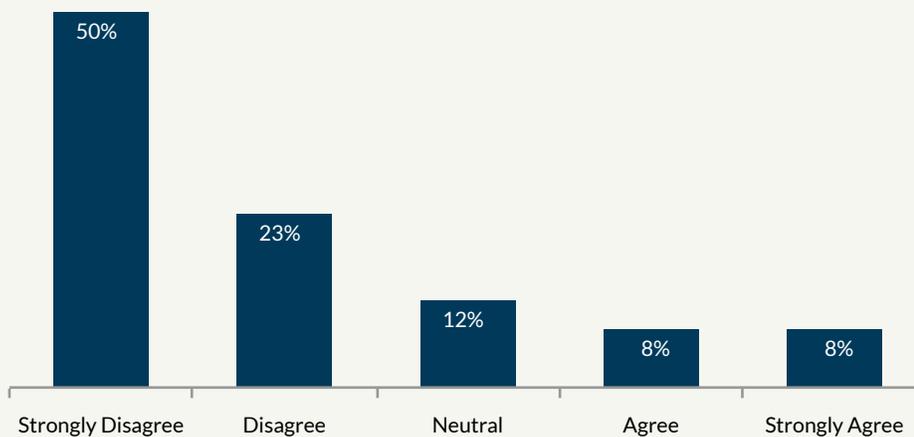
Figure 3 Top Three Challenges Charter Leaders Face in Purchasing a Facility



N=14

Moreover, school leaders report that the state per-pupil funding allocation is insufficient. Nearly three-quarters of school leaders disagreed or strongly disagreed with the statement, “The state per-pupil facilities allocation is adequate to meet the financial obligations of our facility” (see Figure 4).

Figure 4 The State Per-Pupil Facilities Allocation Is Adequate to Meet the Financial Obligations of Our Facility



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In Their Words: Charter School Leaders Describe Their Schools' Facilities Arrangements

Debt Restructuring Saves one of Idaho's Top Charter Schools: North Star Charter School

North Star Charter School opened its doors in 2003 in a small, former Montessori school building in Eagle, Idaho. After outgrowing this initial facility, North Star sold its existing facility and broke ground on a new facility in 2008. While the proceeds from the sale of the previous facility were sufficient to purchase the land and begin the construction on its new facility, the school had not yet acquired a construction loan or long-term takeout to complete the project.

Unfortunately, the national economy collapsed at the same time the school had embarked on its aggressive new facility project. With financing rates rising rapidly and financing options narrowing dramatically, North Star issued nonprofit facilities revenue bonds (through the IHFA) at a market rate of approximately 9.5 percent. The final bond amounted to about \$12 million, including a facility cost of \$9.5 million and approximately \$2 million in various debt reserves.

The bond issue closed in the spring of 2009. That fall, the facility was completed and students moved into the building. Over the next three school years, North Star “operated on nickels and dimes. State funding for public schools decreased 17 percent during this period, which resulted in an erosion of significant portions of the school’s reserve funds,” explained current Director of Finance and Human Resources, George Coburn, who joined the school’s administrative team in the Spring of 2010.

In 2013, as the school’s financial situation continued to deteriorate, North Star’s authorizer, the West Ada School District (then known as the Meridian School District) moved to revoke the school’s charter.ⁱ The school objected and was able to negotiate a forbearance agreement with its bondholders. This agreement required the school and its bondholders to restructure the bonds over the next 12 months, which North Star, its bondholders, and the IHFA were able to do. The restructured bond deal closed in 2014, and effectively saved North Star Charter School.

The restructuring created a long-range financing plan, setting aside nearly \$6 million of the original debt as subordinated debt, with no principal or interest due until 2049. It also resulted in a sustainable interest rate of 6.7 percent on its \$6.3 million restructured senior debt, compared to the previous rate of approximately 9.5 percent on its original \$12 million debt. Ultimately, North Star’s debt restructuring decreased the school’s annual debt service from about \$1.2 million per year down to approximately \$500,000 per year, a reduction of nearly 58 percent.

What can be learned from North Star’s near-death experience? Coburn explains, “Make sure you have strong financial knowledge on your team and a rock-solid plan, and get funding commitments lined up before you start your project to ensure you know where the money will be coming from.”ⁱⁱ

i Richert, Kevin, “Meridian Moves to Revoke North Star Charter,” Idaho Ed News, June 25, 2013, <http://www.idahoednews.org/news/meridian-moves-to-revoke-north-star-charter/>.

ii George Coburn, (Director of Finance and Human Resources, North Star Charter School), interview with authors, July 20, 2016.

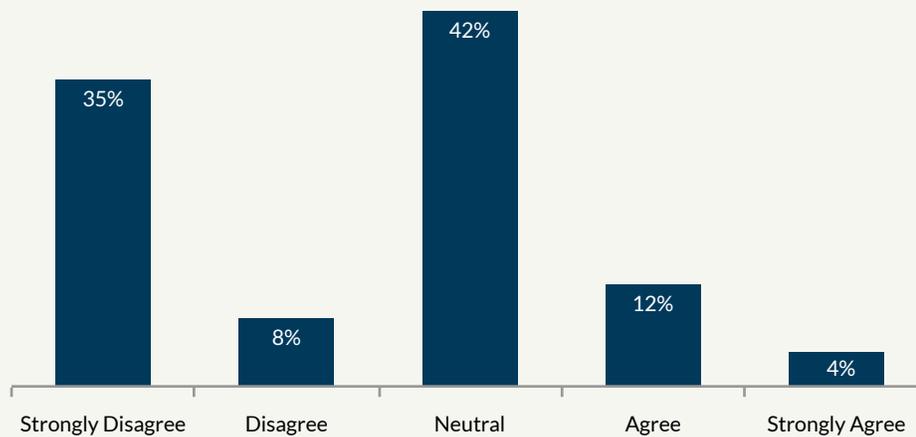
Finding 2: Charter Leaders Struggle to Find Suitable Properties and Often Make Significant Tradeoffs

Finding a suitable and available property in the community the school hopes to serve can be a monumental task.

Without the public financing to build or purchase a school in their first year, many charter school leaders hunt for existing property that can function as a school. Finding a suitable and available property in the community the school hopes to serve can be a monumental task. Just 16 percent of school leaders agreed or strongly agreed with the statement, “When we were looking for our current facility, there were a number of available properties that would have met our needs.” Forty-three percent disagreed or strongly disagreed (see Figure 5). Finding appropriate properties in which to locate their school is a major challenge for charter school leaders.

Figure 5

When We Were Looking for Our Current Facility, There Were a Number of Available Properties That Would Have Met Our Needs

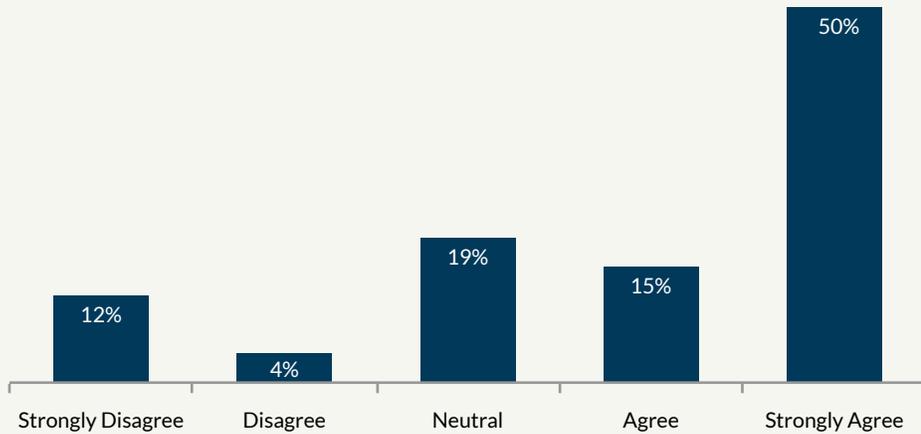


N=26

Once leaders do find an existing facility, the challenges continue: Nearly two-thirds of school leaders indicated they had to make significant modifications to their building to meet their students’ needs (see Figure 6). Depending on the condition of the facility and its previous use, these modifications can be extensive and costly. Updating fire alarms to meet state code for school facilities, for example, can be a \$10,000 cost to charter schools renting or purchasing facilities not originally intended to house a school.⁴⁴

Figure 6

We Had to Make Significant Modifications to Our Facility to Ensure It Met Our Needs

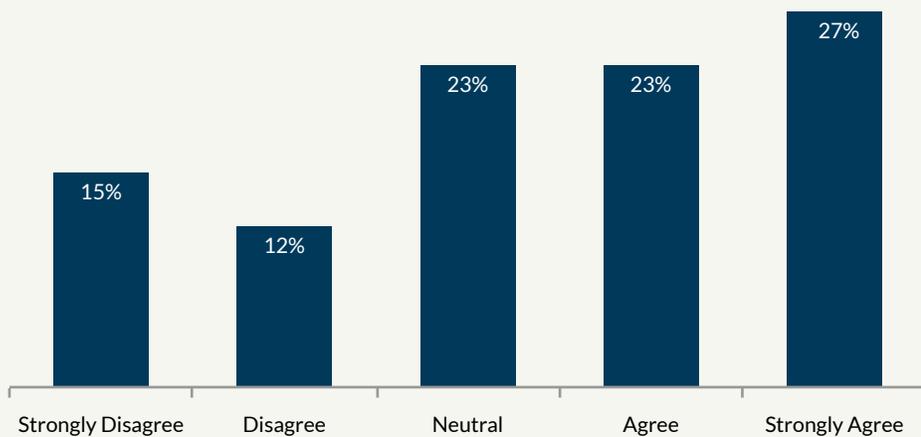


N=26

Half of the survey respondents indicated they had to make substantial compromises to what they wanted when securing a facility (see Figure 7). For example, one school that originally leased a church building had to set up and take down their classroom spaces twice each week to accommodate the church's weekend services and events during the week.

Figure 7

We Had to Make Substantial Compromises to What We Wanted When Securing Our Current Facility



N=26

Limited funds often require tradeoffs like cheaper materials or forgoing amenities. In some cases, the compromises go well beyond forgoing traditional amenities like gyms and computer labs. As one leader explained: “In order to afford a facility, we make compromises in having walls [between classrooms] and very little heat. Students wear coats almost all year long. Our building is not well maintained.”

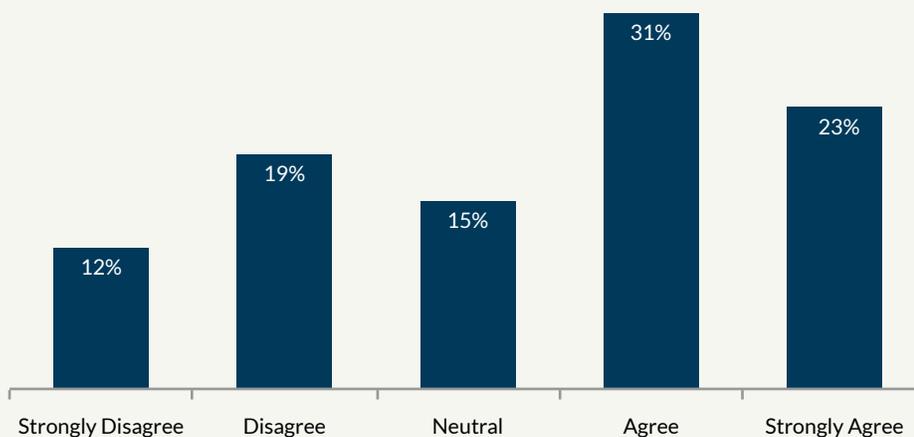
Another leader described his school facility: “The walls between the classes were not insulated and do not go to the roof—hence there is substantial noise between classrooms. There are no bleachers in our gym. There are no locker rooms...There is extremely limited storage. There is not enough classroom and office space.” A third leader lamented, “When we finally saved enough money to build, we could only afford half the building we wanted. We had to cut square feet to make ends meet.”

Finding 3: Inadequate Facilities Funding Makes It More Challenging for Charter Schools to Provide the Educational Programming They Envision

The money spent securing school facilities can have a negative impact on the educational programming charter schools offer to students (see Figure 8).

Figure 8

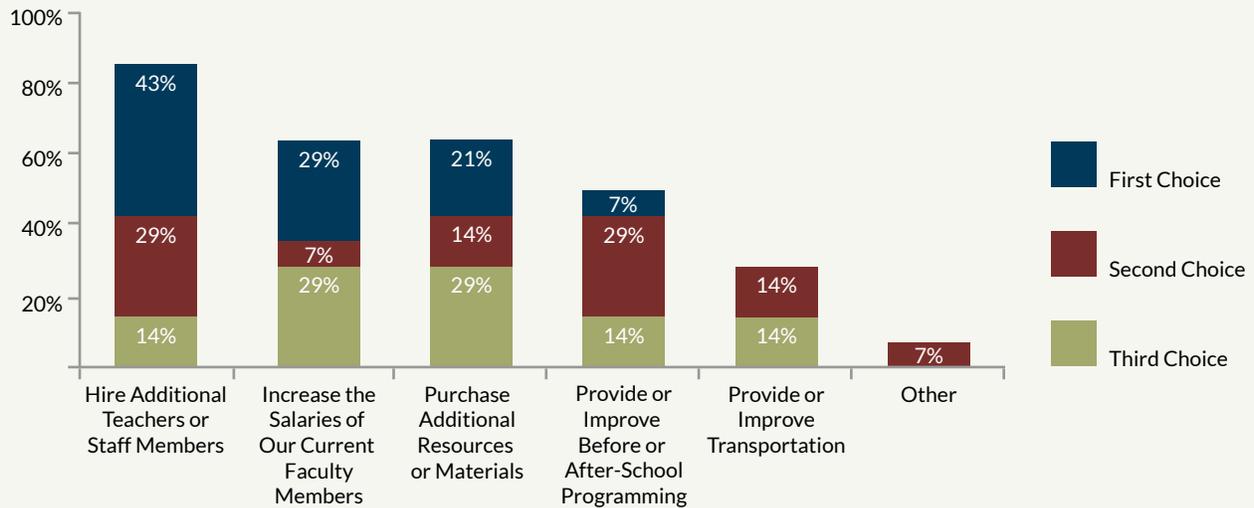
The Amount of Money We Spend on Our Facilities Has a Negative Effect on the Educational Programming We Are Able to Offer Our Students



N=26

The financial burden of their facilities arrangements often prevents school leaders from using their resources for other programs or services. Among those who answered “agree” or “strongly agree” to this question, most would prefer to use the funds to hire additional teachers or staff members. Charter leaders would also use the funds to purchase additional resources or materials; increase salaries of faculty members; provide or improve transportation; and provide or improve before or after-school programming (see Figure 9). As one school leader shared, “We spend so much money from our general fund on financing our building and land that we don’t have adequate resources to fund all of the programs we would like to have.”⁴⁵

Figure 9 Please Rank Your Top Three Options in Response to the Following Prompt: If We Spent Less Money on Our Facilities, We Would Use Those Funds To...



N=14

In Their Words: Charter School Leaders Describe Their Schools' Facilities Arrangements

Facilities Debt Service Makes Growth Challenging: Compass Public Charter School

The Idaho Public Charter School Commission approved the charter of Compass Public Charter School in 2005. Compass' leaders identified land and began working with a developer to build a facility, but construction was delayed because the city of Meridian had not yet extended water or sewage utilities out to their property.

While they waited for utilities, Compass rented space from a church, utilizing it as a school during the week while the church continued to use the space for services in the evenings and on weekends. The national economic decline continued to delay city plans to bring utilities to the school's land, however, and the school decided instead to purchase the church facility they had been renting.

This was in 2010. Idaho did not have per-pupil facilities funding or the debt reserve; Building Hope had not yet set up its Idaho office. Compass' school leaders struggled to get traditional financing. They ended up in a lease-purchase agreement with a private investor who purchased the building from the church for \$2.5 million, with the understanding that he would help Compass remodel the building and ultimately sell it back to them.

In the lease-purchase agreement, the school and the investor agree to a purchase price up front. But, as the national economy struggled to rebound, the reported value of the building depreciated below the agreed-upon price of \$6.5 million.

Through some tough negotiations with the investor, in 2010 Compass ended up purchasing the facility for approximately \$4.8 million, below the original price but still well above market value for the building at the time. School leaders were able to utilize IHFA's tax-exempt bonds to finance the purchase. Even with the \$800,000 the investor put into remodeling the facility, school administrator Kelly Trudeau says, "It's still not worth what we paid or what we owe on it."ⁱ The school dedicates significant operational funding to pay its debt.

Compass has a large waitlist of 700 students and is academically successful. So, despite its tough financial situation and with the help of a grant from the J.A. and Kathryn Albertson Family Foundation, it managed to expand in 2014. It now serves 874 students in grades K-12 in two separate facilities.ⁱⁱ Its debt service to the church facility, however, will likely have a lasting impact on the school's financial health.

i Kelly Trudeau, (Administrator, Compass Public Charter School), interview with authors, July 14, 2016.

ii "Compass Public Charter," Idaho Ed Trends, <http://www.idahoedtrends.org/schools/418/summary>.

Finding 4: Charter Schools Are Able to Construct and Renovate Facilities at a Fraction of What Districts Spend

The inequitable financing for charter facilities puts a strain on charter schools' limited budgets. Districts are on the other side of the spectrum; they have access to more than four times the average per-pupil amount for facility costs as charter schools. In some cases,

In some cases, districts spend nearly eight times what nearby charter schools do.

districts spend nearly eight times what nearby charter schools do (see Figure 13 below). This discrepancy in spending exists despite the fact that all public schools in Idaho—district and charter—are held to the same building safety standards.⁴⁶

Charter schools that own their facilities spend an average of \$5.1 million on them (in 2016 dollars). As Table 7 shows, the average square footage of purchased facilities is 42,337 and they hold approximately 545 seats at capacity. The average cost per seat is \$9,139 and the average cost per square foot is approximately \$120.

Table 7 > Cost Ranges for Owned Charter Facilities⁴⁷

	Low	Average	High
Total facility cost ⁴⁸	\$374,441	\$5.1 million	\$12.6 million
Square footage ⁴⁹	12,000	42,337	97,000
Seat capacity ⁵⁰	260	545	1,200
Student enrollment (2015–16) ⁵¹	177	519	960
Cost per seat ⁵²	\$1,248	\$9,139	\$15,763
Cost per enrolled student (2015–16 enrollment) ⁵³	\$2,115	\$9,590	\$15,823
Cost per square foot ⁵⁴	\$19	\$120	\$186
Square foot per seat ⁵⁵	35	79	123
Square foot per enrolled student (2015–16 enrollment) ⁵⁶	35	86	145

School districts, in contrast, spend much more per pupil for similar projects. In 2016 the West Ada School District completed construction of two new school buildings. As Table 8 shows, the district spent \$27.3 million to construct Victory Middle School and \$14.7 million to construct Hillsdale Elementary School.⁵⁷ The cost to construct North Star Charter School in 2009, on the other hand, which is also located in West Ada, was \$9.5 million (approximately \$10.7 million in 2016 dollars).⁵⁸

In terms of cost per square foot, North Star Charter School spent just 68 percent of what the district spent on Hillsdale Elementary School and 72 percent of what the district spent on Victory Middle School. Accounting for seat capacity, the difference is even starker: North Star Charter School spent less than half of the amount of money per seat compared to Hillsdale Elementary and about one-third of what was spent on Victory Middle School (see Figures 10 and 11).

Table 8 > Comparison of District and Charter Facility Costs in West Ada

Building Name	Year Built	Square Footage	Seat Capacity	Total Cost (2016 dollars)
North Star Charter School ⁵⁹	2009	75,000	1,032	\$10.7 million
Hillsdale Elementary School	2016	70,000 ⁶⁰	650 ⁶¹	\$14.7 million ⁶²
Victory Middle School	2016	138,206 ⁶³	1,000 ⁶⁴	\$27.3 million ⁶⁵

Figure 10 > Cost per Square Foot

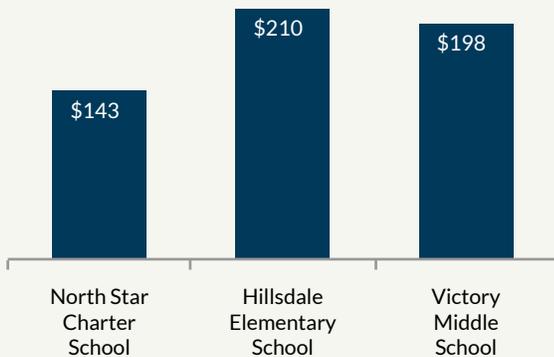
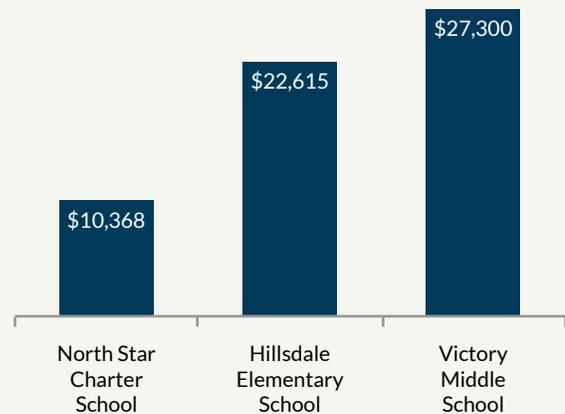


Figure 11 > Cost per Seat



Other examples from across the state show a similar pattern. Idaho Falls School District is currently considering an \$85 million to \$90 million bond to upgrade the district’s two high schools.⁶⁶ Currently, Idaho Falls High School and Skyline High School serve a combined total of 2,419 students.⁶⁷ If the district moves ahead with a \$90 million bond for renovations, it would be at a cost of more than \$37,200 per student. Meanwhile, a new charter school that opened in fall 2016, Alturas International Academy, is currently renovating an old public school building in downtown Idaho Falls for a cost of approximately \$12,000 per seat. At a total cost of \$7.2 million for a 600-seat facility, Alturas’ per-seat renovations cost less than one-third of what the district is asking to spend (see Figure 12).⁶⁸

Figure 12 > Renovation Cost per Seat

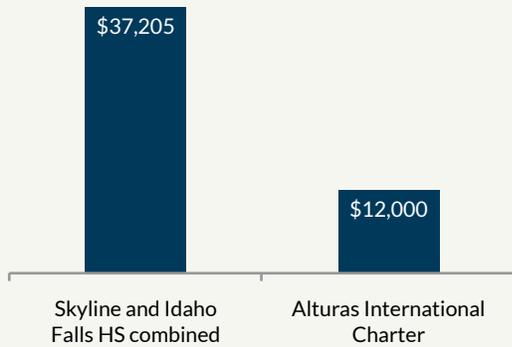
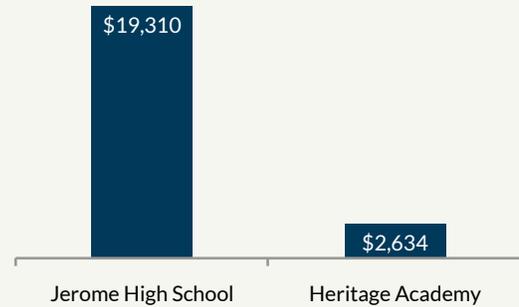


Figure 13 > Renovation Cost per Student



In southern Idaho, the Jerome School District recently completed renovations to Jerome High School that include eight new classrooms, a new cafeteria, new administrative offices, a new gymnasium, and some exterior remodels. The cost of these projects is approximately \$18.46 million.⁶⁹ Jerome’s current student enrollment is 956,⁷⁰ meaning that taxpayers dedicated approximately \$19,300 per child to expand the school facility. Meanwhile, in 2011, local charter school Heritage Academy scraped together \$350,000 (\$374,000 in 2016 dollars) to purchase a facility from a private school. With its first-year enrollment of 142 students, the per-student cost of purchasing and renovating this facility was approximately \$2,600—nearly eight times less than what the district spent on its renovations (see Figure 13).

Charter school leaders are under immense pressure to find and finance facilities that meet the basic learning needs of their students. Policymakers should also recognize the extraordinary work charter leaders are doing given the financial constraints they face; their lack of access to facilities imposes a strong discipline that proves a useful juxtaposition to the practices of traditional school districts.

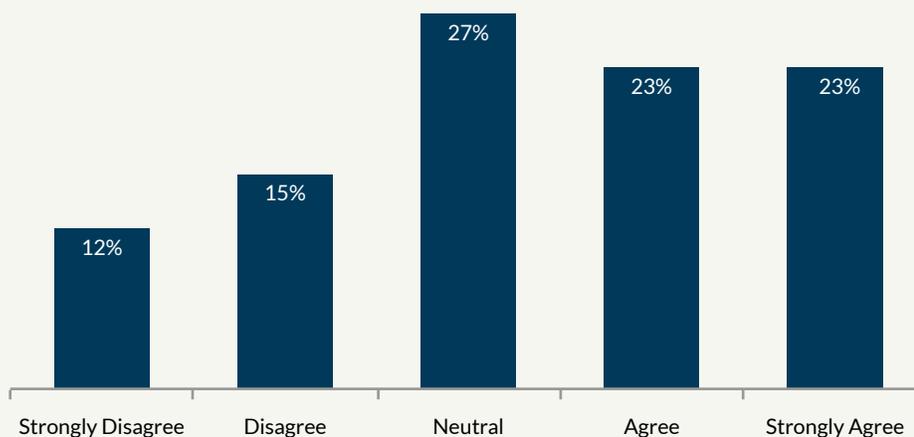
The lesson that should be taken from these examples is not that district schools should receive less funding. Nor is it necessary for charter schools to receive as much as districts. The “right” cost per seat lies somewhere in the middle, and should be closer to equal for all public school students.

The “right” cost per seat lies somewhere in the middle, and should be closer to equal for all public school students.

Recommendations

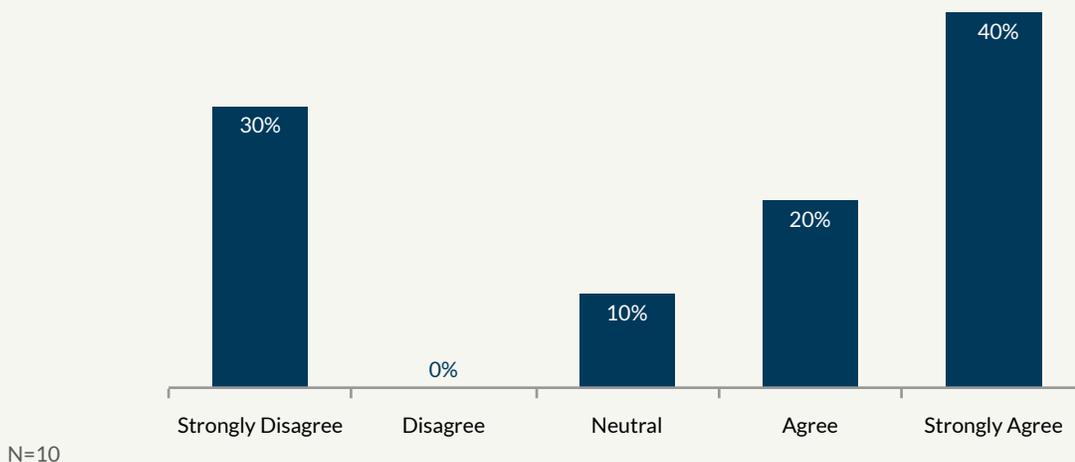
Despite the promising legislative steps taken in recent years, access to facilities remains a significant challenge for both new and existing charter schools. There is no way to know how many charter schools never launch because of the lack of facilities support, but existing charter school leaders know the challenge all too well. Forty-six percent of school leaders agreed or strongly agreed that facilities-related challenges prevent their school from opening new campuses (see Figure 14). In addition, of the respondents who rent their current facilities, 60 percent plan to pursue purchasing land or a facility in the next three to five years (see Figure 15). Idaho policymakers should do more to help the state's public charter schools acquire appropriate facilities.

Figure 14 Facilities-Related Challenges Prevent Our School from Opening New Campuses



N=26

Figure 15 > We Plan to Pursue Purchasing Property or a Facility in the Next 3–5 Years



There are a number of steps the Idaho legislature can take to ensure that taxpayer dollars are used effectively and efficiently to support public education across the state, and directly address the facility needs and challenges of charter schools.

Recommendation 1: Give Charter Schools the Right of First Refusal or Free or Low-Cost Access to Vacant, Taxpayer-Funded Properties

While charter public schools struggle to build or rent a facility, there are often vacant taxpayer-funded buildings available that could house a charter school. If district leaders or other public officials are unwelcoming to charter schools, negotiating with public agencies to obtain their facilities can be a challenge. As one school leader recalled, “We watched the district tear down two schools we would have loved to have. There’s no appetite on their end for working with charters, so those buildings weren’t options for us.”⁷¹

To address this challenge, Idaho policymakers may consider “right of first refusal” laws, which numerous states have used to require public agencies to sell or lease taxpayer-funded facilities to public charter schools before selling them to other parties.

There are three important components of right of first refusal laws. First, states must maintain a record of available buildings. A number of states require the state Department of Education or other state agency to maintain a list of vacant public properties. In Idaho, this responsibility is well suited to Idaho’s Department of Administration or the Division of Building Safety. In other states, these lists usually contain vacant property owned by school districts. However, because not all school districts have vacant property that could

be used by charter schools, Idaho should expand its list to include other taxpayer-funded properties—including not only school district buildings but also municipal and state-owned facilities. Arizona law, for example, requires the state school facilities board and the state Department of Administration to annually publish a list of vacant buildings owned either by the state or by school districts that may be suitable for use by a charter school.⁷²

Second, Idaho policymakers should require the cost of purchasing or leasing a public facility to be free or low-cost for charter schools. In Indiana, for example, if a charter school wishes to use any one of the vacant facilities on the state’s list, the district must lease or sell the building to the charter school for one dollar.⁷³ A similar provision in Idaho would ensure that taxpayers are not paying twice for the same building.

Finally, it is imperative that legislators clearly define what it means for a facility to be “vacant.” Indianapolis Public Schools, for example, has used some of its vacant facilities as “swing space,” teacher training centers, or Head Start offices,⁷⁴ instead of opening them up to charter schools. A clear definition of what it means to be “vacant” would help mitigate confusion and potential conflict.

Right of first refusal and/or low-cost rent can help charter schools access vacant taxpayer-funded facilities. Many states across the nation have implemented such laws, and Idaho can learn from their successes and missteps if it chooses to enact similar legislation.

Recommendation 2: Allow Charter Schools to Be Included in Local District Bonds and Levies

Unlike traditional school districts, charter schools do not have taxing authority and therefore cannot levy taxes or bonds to cover the costs of their facilities. Moreover, local school districts are not required to pass along to charter schools any of the funds they collect through property taxes, levies, or bonds. Thus, families of charter school students pay taxes for schools their children don’t attend while their schools go without.

To address this issue, policymakers may allow (or require) school districts to explicitly include the facility needs of local charter schools in their levy and bond requests.

Such legislation has helped charter schools in Colorado access local funding. In 2002, the state enacted the Charter School Capital Facilities Financing Act, which allowed charter schools to submit a capital construction plan to be included in a school district’s bond issue. Though districts could reject a charter school’s proposal, the charter school could then place a separate ballot question for their school’s proposal.⁷⁵

In 2009 the Colorado legislature amended the law to require (rather than allow) school districts to include charter schools when assessing the district’s capital construction needs.

Families of charter school students pay taxes for schools their children don’t attend while their schools go without.

Districts must invite charter schools to participate in discussions of bond issues and charter schools can submit a capital construction plan to the district to be included in the bond issue. The district board of education must review a charter school's capital construction plan and prioritize it alongside the district's capital needs based on factors outlined in the legislation.⁷⁶

If Idaho's legislators pursue a similar option, there are a number of things to consider. First, legislators must carefully consider whether they want to *require* or simply *encourage* districts to include charter schools' facilities needs alongside the district's needs in local bonds and levies. Many states allow districts to incorporate charter schools, but few do so. It is impossible to know whether the outcome would be similar in Idaho.

Some districts may indeed be willing to collaborate with charter schools, and legislation that allows districts to share local bonds and levies with charter schools may be sufficient (and better received by district officials). In the five years following the passage of Colorado's 2002 legislation, for example, five school districts chose to include charter schools in their general obligation bond elections. By 2007, 26 charter schools in Colorado had benefited from approximately \$54 million in bond proceeds.⁷⁷

However, if districts opt not to collaborate with charter schools, Idaho legislators would still have the option to amend legislation to require coordination—much as Colorado did seven years after its initial legislation. Requiring school districts to include charter schools' capital construction needs in bonds and levies would help ensure that all charter schools and their students are able to benefit from local dollars—not just those operating in charter-friendly districts.

Second, policymakers should consider the pros and cons of combining levies for charter and district schools into a single ballot. A combined ballot prevents a situation in which district parents approve funds for their own schools but not for the charter. However, it also marries the fate of charter schools, which may be desperate for a new building, to the fate of district schools, which may be seeking a “nice to have” but not “must have” renovation or expansion.

Finally, policymakers should require the district to communicate the per-pupil costs of their needs as well as the per-pupil costs of the charter school's needs. Such a provision would ensure transparency for voters, as well as encourage all public schools to ensure they are using taxpayers' money as efficiently as possible.

Recommendation 3: Increase Funding for Existing Programs

3a: Increase the State Per-Pupil Facilities Allocation

As noted above, Idaho lawmakers have already developed a system and a formula to allocate funds to support charter school facilities costs. And the payments are moving in the right direction, beginning at \$122 per student for the 2014–15 school year,⁷⁸ and increasing to \$335 per student for the upcoming school year—30 percent of statewide district bond funds and levies. However, the legislation caps the charter facilities payments at 50 percent of the statewide average per-student amount districts receive from bonds and levies.

Our analysis shows that the average annual facilities-related expenditures for charter schools are \$751 per enrolled student per year. This is more than double the current state allocation of \$335 and more than the maximum 50 percent of average per-student bonds and levies.

At a minimum, the legislature should amend existing legislation to remove the 50 percent cap and increase charter schools' annual facilities allocation to more closely match what schools are actually spending.

3b: Increase Funding for the Public Charter School Debt Reserve

The legislature has appropriated \$750,000 to the statewide debt reserve fund to help reduce the costs of financing for charter school facilities. This amount can likely act as a debt reserve for one charter school.⁷⁹

However, since 1998, an average of three new charter schools have opened each year.⁸⁰ Though new-start charter schools are not eligible for this program (schools must have at least three years of demonstrated financial stability⁸¹), the legislature can match the debt reserve to the pace of charter school growth by increasing its funding to approximately \$1.5 million to \$2 million. This will help ensure that multiple high-performing schools can take advantage of the program.

Conclusion

The steps the Idaho legislature has taken in recent years to address charter schools' facility financing needs are admirable, but insufficient. More must be done to ensure that charter school leaders and their students have access to equal facilities funding.

Existing policies and programs provide relatively straightforward paths to improving the funding prospects of charter schools. Aligning the per-pupil facilities allocation to charter schools' actual spending is an important first step. Adequately funding the charter school debt reserve is another.

But alone, these changes fall short of ensuring charter schools equal access to facilities. As public schools, charter schools must be granted access to vacant district facilities or other municipal or state-owned buildings. They should also have access to local public school funding streams, specifically local property taxes, levies, and/or bond issues.

Charter schools are and can continue to be a valuable option for the state's public school students, but policymakers must continue addressing the gaps in charter schools' access to facilities. Only then will charter schools be positioned to open, expand, and improve the options available to Idaho's next generation.

Appendix: Multiple Choice Survey Questions Complete Data

Questions Asked of All Charter School Leaders (N=26)

Question: Which best describes the type of facility you are in?		
Answer Choices	Frequency	Percent
District facility	5	19.2%
New construction	8	30.8%
Converted commercial space	6	23.1%
Converted church	2	7.7%
Other (please explain)	5	19.2%
Total	26	100.0%

Question: Which best describes the way you found your current property/facility?		
Answer Choices	Frequency	Percent
Commercial real estate agent	3	11.5%
Word of mouth	3	11.5%
Drove by and inquired	2	7.7%
List of vacant district properties	1	3.8%
List of vacant city properties	3	11.5%
Other (please explain)	14	53.8%
Total	26	100%

Question: Which of the following facilities-related policies, programs, or organizations are you aware of? (Select all that apply.)		
Answer Choices	Frequency	Percent
Idaho Housing and Financing Association bond financing	16	61.5%
Building Hope	16	61.5%
State per-pupil facilities allowance	19	73.1%
Public Charter School Debt Reserve	15	57.7%
None of the above	2	7.7%
Other (please explain)	3	11.5%

Question: Please rate your level of agreement with each of the following statements												
Answer choices	Strongly disagree		Disagree		Neutral		Agree		Strongly agree		Total	
	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent
The condition of our school facility negatively affects students' ability to learn.	9	34.6%	9	34.6%	3	11.5%	4	15.4%	1	3.8%	26	100%
Our school facility can accommodate our school if enrollment increases.	7	26.9%	7	26.9%	3	11.5%	6	23.1%	3	11.5%	26	100%
When we were looking for our current facility, there were a number of available properties that would have met our needs.	9	34.6%	2	7.7%	11	42.3%	3	11.5%	1	3.8%	26	100%
We had to make significant modifications to our facility to ensure it meets our needs.	3	11.5%	1	3.8%	5	19.2%	4	15.4%	13	50.0%	26	100%
We had to make substantial compromises to what we wanted when securing our current facility.	4	15.4%	3	11.5%	6	23.1%	6	23.1%	7	26.9%	26	100%
Facilities-related challenges prevent our school from opening new campuses.	3	11.5%	4	15.4%	7	26.9%	6	23.1%	6	23.1%	26	100%

Question: Please rate your level of agreement with each of the following statements												
Answer choices	Strongly disagree		Disagree		Neutral		Agree		Strongly agree		Total	
	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent
As the school leader, I spend too much time managing issues with our facility.	3	11.5%	5	19.2%	7	26.9%	9	34.6%	2	7.7%	26	100%
As the school leader, I feel I have access to the information and resources necessary to find a suitable facility for my school.	0	0.0%	3	11.5%	11	42.3%	9	34.6%	3	11.5%	26	100%
As the school leader, I feel equipped to handle the legal and financial aspects of our facility.	1	3.8%	5	19.2%	6	23.1%	10	38.5%	4	15.4%	26	100%
As the school leader, I feel equipped to handle any maintenance or repair issues with our facility.	2	7.7%	5	19.2%	3	11.5%	11	42.3%	5	19.2%	26	100%
The state per-pupil facilities allocation is adequate to meet the financial obligations of our facility.	13	50.0%	6	23.1%	3	11.5%	2	7.7%	2	7.7%	26	100%
The amount of money we spend on our facilities has a negative effect on the educational programming we are able to offer our students.	3	11.5%	5	19.2%	4	15.4%	8	30.8%	6	23.1%	26	100%

Question: Please rank your top three options in response to the following prompt: If we spent less money on facilities, we would use those funds to:

Answer choices	First choice		Second choice		Third choice	
	Freq.	Percent	Freq.	Percent	Freq.	Percent
Hire additional teachers or staff members	6	42.9%	4	28.6%	2	14.3%
Increase the salaries of our current faculty members	4	28.6%	1	7.1%	4	28.6%
Purchase additional resources or materials	3	21.4%	2	14.3%	4	28.6%
Provide or improve before or after-school programming	1	7.1%	4	28.6%	2	14.3%
Provide or improve transportation	0	0.0%	2	14.3%	2	14.3%
Other (please explain)	0	0.0%	1	7.1%	0	0.0%
Total	14	100%	14	100%	14	100%

Question: Please indicate whether or not your school facility has a designated space for each of the following:

Answer choices	Yes		No		Total	
	Freq.	Percent	Freq.	Percent	Freq.	Percent
Computer lab	21	80.8%	5	19.2%	26	100%
Cafeteria	17	65.4%	9	34.6%	26	100%
Playground	21	80.8%	5	19.2%	26	100%
Auditorium	10	38.5%	16	61.5%	26	100%
Library	11	42.3%	15	57.7%	26	100%
Gym	14	53.8%	12	46.2%	26	100%

Question: Do you have insurance that would cover any unexpected damage or major repairs to your facility?

Answer Choices	Frequency	Percent
Yes, and we are comfortable with our level of insurance coverage	25	96.2%
Yes, but we are not comfortable with our level of insurance coverage	1	3.8%
No, we do not have insurance	0	0.0%
Total	26	100%

Question: Do you rent or own your current facility?

Answer Choices	Frequency	Percent
Rent	10	38.5%
Own	16	61.5%
Total	26	100%

Question: Do you plan to stay in your current facility for the foreseeable future?		
Answer Choices	Frequency	Percent
Yes; we have no plans to move to a different facility	15	57.7%
Yes; we plan to stay into our current facility and expand into new facilities	7	26.9%
Maybe; we are open to moving if we find a better facility	1	3.8%
No; but we are not actively searching for a new facility	0	0.0%
No; we are currently engaged in an active search for a new facility	3	11.5%
Total	26	100.0%

Questions Asked of All Leaders Whose Schools Own Their Facilities (N=16)

Question: Please rate your level of agreement with each of the following statements												
Answer choices	Strongly disagree		Disagree		Neutral		Agree		Strongly agree		Total	
	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent
I feel comfortable with my school's current facilities arrangement.	2	12.5%	1	6.3%	1	6.3%	7	43.8%	5	31.3%	16	100.0%
I feel confident that we are able to meet our monthly mortgage payments.	0	0.0%	0	0.0%	2	12.5%	7	43.8%	7	43.8%	16	100.0%
If our school enrollment falls more than 10 percent short of our enrollment projections next year, we will have trouble making our monthly mortgage payments.	3	18.8%	3	18.8%	2	12.5%	7	43.8%	1	6.3%	16	100.0%
There are adequate programs available in the state to aid charter school leaders in financing school facilities.	6	37.5%	8	50.0%	0	0.0%	1	6.3%	1	6.3%	16	100.0%
My school's board has the expertise necessary to make informed decisions about future building renovations or property purchases.	0	0.0%	5	31.3%	3	18.8%	6	37.5%	2	12.5%	16	100.0%
We plan to purchase additional property/facilities in the near future to expand our school.	3	18.8%	1	6.3%	3	18.8%	7	43.8%	2	12.5%	16	100.0%

Question: From which source did you get the majority of your facilities financing?		
Answer Choices	Frequency	Percent
Philanthropy	0	0.0%
IHFA bond financing program	3	11.5%
Private financing	5	19.2%
Other (please explain)	8	30.8%
Total	16	100.0%

Question: Please rank the top three challenges you have faced in purchasing and owning a school facility.

Answer choices	First choice		Second choice		Third choice	
	Freq.	Percent	Freq.	Percent	Freq.	Percent
Accessing financing	5	31.3%	8	50.0%	0	0.0%
Finding property that meets our school's needs	4	25.0%	1	6.3%	3	18.8%
Not having adequate resources or training to navigate this issue	3	18.8%	2	12.5%	3	18.8%
Managing renovations to an existing facility	2	12.5%	2	12.5%	3	18.8%
Working with the city to get property zoned and/or plans approved	0	0.0%	0	0.0%	3	18.8%
Other (please explain)	0	0.0%	1	6.3%	2	12.5%
Missing	2	12.5%	2	12.5%	2	12.5%
Total	16	100%	16	100%	16	100%

Question: Since your school launched, how many times have you moved facilities?

Answer Choices	Frequency	Percent
1 time	6	37.5%
2 times	2	12.5%
3 times	3	18.8%
4 or more times	0	0.0%
We have not moved facilities since our school launched	4	25.0%
Missing	1	6.3%
Total	16	100%

Question: Which best describes the main reason for your school's moves?

Answer Choices	Frequency	Percent
Outgrew our previous facility	3	27.3%
Found property in a better location	0	0.0%
Found property that better met our students' needs	3	27.3%
We purchased new property	2	18.2%
Other (please explain)	3	27.3%
Total	11	100.0%

Question: How long did it take from the start of your search for property until your building was ready for students?

Answer Choices	Frequency	Percent
Less than one year	5	31.3%
1 year	2	12.5%
2 years	4	25.0%
3 or more years	4	25.0%
Missing	1	6.3%
Total	16	100.0%

Questions Asked to Leaders Whose Schools Rent Their Facilities (N=10)

Question: Please rate your level of agreement with each of the following statements

Answer choices	Strongly disagree		Disagree		Neutral		Agree		Strongly agree		Total	
	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent	Freq.	Percent
Finding an adequate facility to rent was a straightforward process.	0	0.0%	3	30.0%	5	50.0%	1	10.0%	1	10.0%	10	100.0%
I feel comfortable with my school's current lease agreement.	2	20.0%	0	0.0%	2	20.0%	4	40.0%	2	20.0%	10	100.0%
Our school has previously attempted to purchase a facility but was unable to.	5	50.0%	1	10.0%	1	10.0%	3	30.0%	0	0.0%	10	100.0%
We plan to pursue purchasing property or a facility in the next 3-5 years.	3	30.0%	0	0.0%	1	10.0%	2	20.0%	4	40.0%	10	100.0%
If our school was able to purchase a facility, we would save money.	2	20.0%	1	10.0%	1	10.0%	1	10.0%	5	50.0%	10	100.0%

Question: Since your school launched, how many times have you moved facilities?

Answer Choices	Frequency	Percent
1 time	2	20.0%
2 times	0	0.0%
3 times	0	0.0%
4 or more times	1	10.0%
We have not moved facilities since our school launched	7	70.0%
Total	10	100.0%

Question: Which best describes the main reason for your school's moves?		
Answer Choices	Frequency	Percent
Outgrew our previous facility	3	100.0%
Found property in a better location	0	0.0%
Found property that better met our students' needs	0	0.0%
We purchased new property	0	0.0%
Other (please explain)	0	0.0%
Total	3	100.0%

Question: Please rank the top three challenges you have faced in securing a school facility.						
Answer choices	First choice		Second choice		Third choice	
	Freq.	Percent	Freq.	Percent	Freq.	Percent
Cost of the facility	6	60.0%	2	20.0%	1	10.0%
Finding an adequate facility	3	30.0%	5	50.0%	0	0.0%
Negotiating an adequate rental agreement	0	0.0%	1	10.0%	4	40.0%
Managing facilities-related maintenance or repair issues	0	0.0%	2	20.0%	2	20.0%
Not having adequate resources or training to navigate this issue	0	0.0%	0	0.0%	1	10.0%
Other (please explain)	1	10.0%	0	0.0%	2	20.0%
Total	10	100%	10	100%	10	100%
Total	16	100%	16	100%	16	100%

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- 23 Eighteen respondents provided complete data for all relevant data points, including square footage, seat capacity, total cost of facility (if purchased), monthly rent/mortgage, and total annual facilities-related expenditures. However, some data points had more than 18 responses. In all cases, the averages presented in this report represent the maximum number of responses available. For example, 20 out of 26 respondents reported their total annual facilities-related costs, while 25 out of 26 respondents reported the total square footage of their facility. The average annual costs reported above represent the average of the 20 respondents who reported that data, while the square footage reported above is the average of the 25 respondents who reported that data. In cases where two data points are necessary (square feet per seat, for example), the schools included in the calculation must have reported both data points (square footage and seat capacity of their facility, for example). The n-size of each calculation is provided in endnotes.
- 24 Based on data from 20 out of 26 respondents.
- 25 Based on data from 15 out of 16 owners; adjusted for inflation and reported in 2016 dollars.
- 26 Based on data from 22 out of 26 respondents.
- 27 Based on data from 20 out of 26 respondents.
- 28 Based on data from 20 out of 26 respondents.
- 29 Based on data from 25 out of 26 respondents.
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- 48 Based on data reported by 15 out of 16 owners.
- 49 Based on data reported by 16 out of 16 owners.
- 50 Based on data reported by 16 out of 16 owners.
- 51 Based on data reported by 16 out of 16 owners.
- 52 Based on data reported by 15 out of 16 owners; costs are adjusted for inflation and reported in 2016 dollars.
- 53 Based on data reported by 15 out of 16 owners; costs are adjusted for inflation and reported in 2016 dollars.
- 54 Based on data reported by 15 out of 16 owners; costs are adjusted for inflation and reported in 2016 dollars.
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