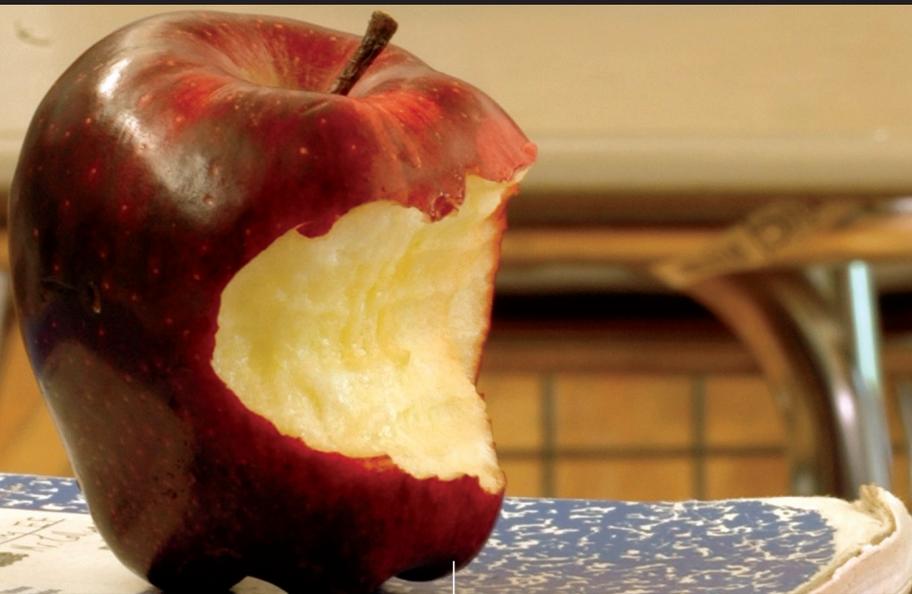


CHARTER SCHOOL FACILITIES INITIATIVE

PRE-SURVEY COMMUNICATIONS TOOLKIT



REV. OCTOBER | 2014



COLORADO LEAGUE of
CHARTER SCHOOLS
focus on achievement



National **Charter School Resource** Center
at Safal Partners



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**Charter School Facilities Initiative
Pre-Survey Communications Toolkit**

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*All completed state reports are available at www.facilitiesinitiative.org (go to “Reports”)

INTRODUCTION

Congratulations on your decision to take part in the Charter Schools Facilities Initiative (CSFI). Your Charter Support Organization (CSO) is joining CSOs across the United States to find solutions to facilities challenges that are all too often faced by our nation's charter schools.

The Colorado League of Charter Schools (the League) and the National Alliance for Public Charters Schools (the Alliance) look forward to partnering with you on this important project and are here to assist you each step of the way.

The following Communications Toolkit takes what the League, the Alliance and other participating CSOs have learned throughout the facilities project, and is intended to provide your CSO with communications guidelines to assist in encouraging charter schools in your state to participate in this important facilities survey.

This toolkit will provide you with messaging and sample communications to explain the purpose of the survey to charter schools in your state, tips to make the survey process easier for schools, and ideas to overcome any pushback or objections you might face.

Should you need any further assistance with communications efforts related to this facilities project, please contact the Colorado League of Charter Schools' Communications Department.

Sincerely,



Nora E. Flood, President
Colorado League of Charter Schools



Stacy Rader, Director of Communications
Colorado League of Charter Schools

Colorado League of Charter Schools Communications Department

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SECTION 1: PURPOSE AND BACKGROUND

Most charter school laws across the country place the burden of obtaining and paying for facilities on the charter schools themselves. As a result, charter schools often struggle to find suitable and affordable facilities, and charter leaders routinely identify facilities as one of their top challenges of running a school.

In 2007, based on anecdotal reports and considerable time spent across Colorado's charter community, it was clear that inadequate and costly facilities were the norm. Fifteen years into the charter experience, state policy continued to provide an inadequate and inequitable structure for charter school capital needs. In response, the Colorado League of Charter Schools (the League) commissioned a *2010 Task Force* to build the case for changes to remove barriers to adequate and equitable access to public school facilities and financing for Colorado charter schools. While the need to improve the landscape of charter school facilities and facilities financing was evident within the charter community, the League understood that anecdotes and hearsay were insufficient to influence policy makers; a key missing piece was reliable data on the condition and cost of charter school facilities.

In order to provide reliable data in support of the League's Task Force objectives, the League developed a comprehensive survey, the *Charter School Facilities Survey*, to gather objective, reliable facilities data from Colorado's charter community.

The League published the results of the *Charter School Facilities Survey* in a 2008 report entitled "*Shortchanged Charters: How Funding Disparities Hurt Colorado's Charter Schools.*" The report, and the data the survey revealed, provided the League's Task Force with the necessary information to build its policy framework. Since then the League has been able to leverage that combination of data and policy to make substantial gains in its facilities efforts.

As in Colorado, charter schools across the nation struggle with inadequate and costly facilities. Based in part on Colorado's policy gains following the publication of *Shortchanged Charters: How Funding Disparities Hurt Colorado's Charter Schools*, the League and the Alliance determined it was time to expand this effort to other states. Since 2010, the League and the Alliance have partnered with 14 state charter support organizations (CSOs) to collect state-specific data comparable to what took place in Colorado. The results are published in a series of state-specific reports jointly authored by the League, the Alliance, and respective CSO partners, and can be found at www.facilitiesinitiative.org.

Since hard data continues to be a more effective method of improving policy around charter school facilities access, the League and the Alliance are continuing their facilities efforts and partner with CSO's each year to expand the facilities initiative and data available.

The following Communications Toolkit takes what the League, the Alliance and other participating CSOs have learned through the facilities project to date, and is intended to provide your CSO with communications resources to assist in encouraging charter schools in your state to participate in this important facilities survey.

SECTION 2: TARGET AUDIENCES

Common Audience Types

Overall, your CSO will be emphasizing the need for charter school participation in the facilities survey. Your main audience will be administrators/principals at charter schools in your state. However, there are a couple other factors that will need to be taken into consideration when creating messaging around the facilities initiative.

Considerations

School Size

Small Schools (principal and staff wear many hats)

For smaller schools, with no management organization, the target audience for messaging will be the principal. Leaders of smaller charter schools often wear multiple hats, and as such, the facilities survey may feel more daunting to this administrator, as they may not have anyone to whom they can delegate.

For this audience, assure the school leader that your CSO is available to help with the survey completion and make this type of school your first priority. Be willing to send a consultant or CSO staff member to be onsite at these schools to assist with survey completion.

Larger Schools with Additional Staff such as Business Managers, Facilities Directors

For larger schools with more staff, the principal may delegate completion of the facilities survey to the school's business manager or facilities director. When communicating with these types of schools, be sure to ask the school leader who you should direct further correspondence to regarding the survey. Business managers/finance staff are very sensitive to facilities and budget challenges, so in that sense, this audience may be a bit easier to activate around the need to complete the survey in a timely manner.

School's Relationship with an Educational Service Provider/CMO/EMO

Some schools with Education Management Organizations (EMOs) or Charter Management Organizations (CMOs) may require that the facilities survey be completed by the EMO/CMO, or that the EMO/CMO be involved in the process. For schools with EMO/CMOs, it's important to ask the school leader if the EMO/CMO should be included in communications regarding the facilities survey, and if so, who you should be in contact with at that organization.

CSO Relationship with School Leaders

Another consideration is your CSO's relationship with each school leader. School leaders who are familiar with your CSO and utilize CSO services regularly, and are in the loop about the CSO's advocacy efforts may be more likely to respond, while charter schools that do not have a strong relationship with your CSO, may be less likely to respond. **When sending communications to schools that are not connected to your CSO, keep in mind that this is an opportunity to build a relationship with these schools.** Written communications may not be enough to convince these schools to participate in the survey process. You may need to pay a personal visit to these school leaders to introduce yourself, and reinforce the importance of the survey.

Other Stakeholders to Consider

Consider engaging other stakeholders in your state who might be willing to reach out and encourage charter school leaders to participate in the survey. This could include philanthropic groups or funders, back office support companies that provide services to charter schools, other partner vendors, elected officials, etc.

SECTION 3: KEY MESSAGES/CALL TO ACTION

First and foremost, be sure to communicate your CSO’s overall policy strategies and legislative priorities to your schools! Don’t assume they know/understand that facilities are an issue for charter schools across the board.

Call to Action/Main Messages

1. Participate in the survey!
 - a. The time spent to complete the survey is an investment to help all public school children access quality school facilities.
 - b. The Charter Support Organization (CSO) is available to help with survey completion.
 - c. We need you! Message to each school leader should be that they are critical to this effort.
2. Get involved in longer term charter school/education policy initiatives (i.e. testifying at Capitol).

Supporting Messages

Premise

- All of the state’s school children deserve facilities adequate to provide a quality education and promote student achievement.
- A significant number of the state’s children attend schools that lack access to the funding necessary to provide adequate facilities—charter school students being a notably under-resourced group.
- As a result of inequitable access to facilities, charter schools spend a significant amount of money out of operating costs to pay for building rent/financing.

Objective

- The Facilities Initiative will identify prominent shortcomings in the current capital landscape and develop a blueprint of public policy and private sector changes leading to a comprehensive, long-range system of adequate public school facilities.
- By using hard data versus anecdotal data, the CSO will be able to make a stronger case to elected officials that charter schools need equal access to adequate facilities and facilities funding.

Why Every School Needs to Participate

- Because charter school leaders have expressed that facilities challenges are a top priority and concern, and this survey is a way to take action
- The survey is an investment in improving charter school access to adequate facilities and facilities financing
- This is the first survey of its kind in the state
- The survey will identify the true breadth and magnitude of facility needs
- The survey will help determine financial needs and gaps
- The survey results will inform the public policy and legislative processes
- The survey will provide leverage for a permanent capital funding stream for charter schools
- The survey will help gather evidence for litigation, if necessary
- Hard data will help create real change versus current anecdotal data

SECTION 4: POSSIBLE STRATEGIES

Remember, when promoting the facilities survey, this is also a great opportunity to build relationships and market your CSO's services.

The following are suggested strategies to use in promoting the facilities survey. This list is not meant to be exhaustive; feel free to pick and choose strategies from the list, or add new ideas of your own.

1. Send an introductory email to school principals giving them an overview of the Facilities project and a date when they can expect to receive the survey.
2. Send a letter to school leaders from the Governor, Mayor or other elected official encouraging the schools to participate in the facilities project and explaining why it's important.
3. Host a series of webinars to explain the facilities project in more detail and provide tips on how to complete the survey in a shorter amount of time.
4. Schedule school visits and meet with principals in person to discuss the importance of the survey and offer assistance, note concerns, answer questions, etc.
5. Send email/letters to school leaders written by other charter school leaders who have completed the survey (or have committed to completing the survey), explaining why they believe the project is critical.
6. Include reminder blurbs in your CSO newsletters, website, membership renewal packets, and other correspondence.
7. Offer incentives for survey completion, i.e. receive one free registration to the CSO's State Conference, or complete the survey and be entered into a drawing for a chance to win a prize (i.e. donated airline tickets, dinners, hotel stays, etc).
8. Host town halls and regional meetings to further discuss the facilities project and answer questions/concerns.
9. Once the survey is live, follow up with schools and offer to send a consultant out to assist with survey completion (send consultants to small/single-operator schools first as they are more likely to not have enough resources to complete the survey without assistance).
10. Follow up with schools that start the survey but don't complete it, and ask what your CSO can do to assist them in finishing the survey.

SECTION 5: OVERCOMING PUSHBACK / OBJECTIONS

In order to make the survey results statistically useful, we aim for at least 50% completion rate of all eligible charter schools. But it is highly recommended that your CSO aim higher and set a participation goal of 85%. This will help encourage more schools to take the survey, and more data provides the clearest picture of charter school facility needs in your state.

Survey Length

- The survey may seem daunting to a busy school leader. However, you will provide schools with the type of information they should have in front of them when completing the survey, which will lessen the completion time. Also, there are many areas where skip logic is used, which means that it is unlikely that a school leader will answer every question on the survey. Consistently remind school leaders that this is an important investment. The data collected will provide hard data (versus anecdotal data) to help create positive change around facilities access for charter schools.
- CSO staff or consultants will schedule an appointment to visit each charter school to take building measurements, answer questions, and provide assistance in completing the survey.
- The CSO is available to answer questions and provide assistance with the survey, as well as provide tips to make the process more efficient.

Why Every School Needs to Participate

- Because the CSO has received feedback from the state's charter schools showing that facilities challenges are a high priority and concern for charter schools, and this is our chance to act.
- This is the first survey of its kind in the state
- To identify breadth and magnitude of facility needs
- To determine financial needs and gaps
- To inform the public policy and legislative processes
- To provide leverage for a permanent capital funding stream
- To gather evidence for litigation if necessary
- This is an investment in improving charter school access to quality facilities
- Because hard data will help create real change vs. current anecdotal data

SECTION 6: HIGHLIGHTING NATIONAL PARTNERSHIPS AND SUCCESSES IN OTHER STATES

The Charter School Facilities Initiative is comprised of national partners, including the Alliance, the League and the National Charter School Resource Center with funding from the U.S. Department of Education.

To date, 14 states have participated in this project: Arkansas, California, Colorado, Georgia, Idaho, Indiana, Massachusetts, Michigan, New Jersey, New York, Rhode Island, South Carolina, Tennessee, and Texas.

Being selected to participate in the Charter School Facilities Initiative is an accomplishment and an honor. Be sure to promote that fact with charter schools

As a result of the CSO efforts, your state has been chosen to participate in this national project. This is an accomplishment that you should highlight when encouraging charter schools in your state to participate in the facilities survey.

Your members may be more inclined to participate in this project because of the national partnerships, and the resulting national interest and efforts that will be employed in your state. It is important that your membership understand that this data will be used to advance the CSOs advocacy and policy goals around charter school facilities equity.

In promoting this survey in your state, it may be helpful to highlight the ways previous participating states have used the data collected from this project. Some successes are highlighted below:

- **Colorado:** Has consistently used in the data gathered via the Charter School Facilities Initiative to highlight the facilities challenges faced by charter schools. In 2014, the facilities data was used to make a case for increased funding for the Charter School Capital Construction Fund (state grant funding for charter school facilities). This fund was increased from \$5 million annually to \$18 million annually. In addition, the state's moral obligation program which allows eligible charters to use the state's credit rating to secure facilities had its cap raised to \$500 million, marking the first raise in this cap in over eight years.
- **Idaho:** In 2013, data from the facilities initiative in Idaho helped pass legislation that provides up to \$1.4 million to the 40 charter schools operating across the state, to help cover building and maintenance costs. *"The facilities report helped charter schools in Idaho, for the very first time, get some facility dollars from the state this year (about \$120 per student in 2013-14 and \$180 in 2014-15)," said Suzanne Metzgar, Director of Member Services, Idaho Charter School Network.*
- **Massachusetts:** Thanks to data from the facilities initiative, the Massachusetts Development Finance Agency was awarded \$2,671,388 by the U.S. Department of Education to issue guarantees on behalf of charter schools to guarantee a portion of a loan or bond made to a charter school to improve its school facility.
- **South Carolina:** The charter facilities initiative had a direct impact in South Carolina. It resulted in the passage of the Charter Facility Tax Bill, which exempts charter schools from all state or local taxes, except sales tax, on both owned and leased facilities. In addition, the state created a revolving loan fund for charter schools. *"The Charter Facility Tax Bill is a direct result of the work on the facilities study. The facility survey has help SC frame the facility conversation for legislators and key decision makers as well as build a foundation for greatly improved future charter facilities development," said Mary Carmichael, Executive Director, Public Charter School Alliance of South Carolina.*

- **New Jersey:** Data from the facilities initiative in New Jersey helped create \$125 million in Qualified School Construction Bonds (QSCBs) to support the construction, expansion or enhancement of charter schools in the state.
- **Texas and New York:** Facilities initiative data in Texas and New York have been used in litigation in legal proceedings related to charter school access to equitable facilities.

APPENDIX A – SAMPLE COMMUNICATIONS AND MESSAGING

1. SAMPLE EMAIL INTRODUCING THE FACILITIES INITIATIVE TO SCHOOL LEADERS (all school sizes) – Version 1

Dear Charter School Leader:

Time and time again, [insert state] charter school leaders have expressed that facilities challenges (quality, availability, and cost) are a top priority and concern. For years, the [insert CSO name]’s legislative agenda and policy efforts have focused on a variety of improvements to the facilities landscape charter schools operate within. Over the next few months, however, the [CSO name] is redoubling its facilities related efforts. We hope we can count on you to assist us in making the case that all [INSERT STATE] children deserve adequate educational facilities.

The [CSO name] is launching a new Facilities Initiative that will dramatically reshape the charter school facilities landscape. Its objective is as follows:

- All [insert state] school children deserve facilities adequate to provide a quality education. A significant number of [insert state] children attend schools that do not have access to the funding necessary to provide adequate facilities – charter schools being a notably under-resourced population.

The [CSO name] is partnering with the Colorado League of Charter Schools and the National Alliance for Public Charter Schools to develop and implement a comprehensive facilities survey and accompanying policy report on the state of [insert state] charter school facilities.

The Facilities Initiative will identify prominent shortcomings in current capital landscape, and develop a blueprint of public policy and private sector changes leading to a comprehensive long-range system of adequate public school facilities.

Similar surveys and reports have been conducted in 14 states to date, and the results have allowed those states to make legislative and policy gains to enhance the quality financing and availability of facilities to their charter schools. Visit www.facilitiesinitiative.org to see the state reports and to learn more about this project.

In order to make this a successful endeavor in [insert state], your participation in the upcoming survey will be essential.

More information will be coming soon. Please feel free to contact me at ____ if you have any questions.

Sincerely,

CSO Executive Director

2. SAMPLE EMAIL INTRODUCING THE FACILITIES INITIATIVE TO SCHOOL LEADERS (all school sizes) – Version 2

Dear _____:

Recently the [INSERT CSO NAME] launched a new charter school facilities initiative, a comprehensive analysis of the issues and challenges facing [INSERT STATE]'s charter schools and their access to affordable, adequate facilities.

The objective of our effort is to create a policy environment that dramatically improves support for the varied facilities needs of charter schools across our state.

We are currently developing a variety of policy initiatives and private sector efforts that get us closer to that goal. **Making it a reality, however, requires substantially better data about the current state of charter school facilities - which in turn leads us to the online questionnaire you will receive in a follow-up email (within the next day or so).**

Our efforts to shape a policy environment where every charter school in [INSERT STATE] has access to an adequate, affordable facility begin with our developing an accurate picture of where our state's charter schools are today. We have hired a team of facilities and finance experts to develop the questionnaire and package its results into supporting materials for our policy efforts.

While you will receive a link to the online questionnaire soon, we wanted to provide access to the downloadable questionnaire in advance so you can review it and print it out to assist with completing the online official version of the questionnaire. You can download the printable questionnaire at: [\(insert link\)](#).

Please note that a staff member or consultant from our office will be contacting you to set up an appointment to come out and assist you with the survey, including taking measurements of your school building, and answering any questions you may have.

If you do not receive the link to the online version in the next day or so, please check your spam filter or otherwise let us know and we can re-send. We are asking that you complete this questionnaire by [INSERT DEADLINE DATE] for compilation in advance of the upcoming legislative session.

The questionnaire itself will include appropriate directions and contact information for questions. In the meantime, please feel free to contact me directly for more information about any of the above at [INSERT CONTACT INFORMATION].

Thank you in advance for taking the time to fill out the questionnaire.

Sincerely,

CSO Executive Director

P.S. Visit www.facilitiesinitiative.org to learn more about this project.

3. SAMPLE LETTER MAILED TO CHARTER SCHOOLS OF ALL SIZES – ON CSO LETTERHEAD SENT VIA USPS

Dear Charter School Leader:

CCSA is proud to announce that we are partnering with the Colorado League of Charter Schools and the National Alliance for Public Charter Schools on a U.S. Department of Education national Charter Schools Facilities Initiative (CSFI) survey in early 2014.

Time and time again, California charter school leaders have expressed that facilities challenges (quality, availability, and cost) are a top priority and concern. As you know, this is also a top advocacy priority for CCSA and for years our legislative agenda and policy efforts have focused on a variety of improvements to the facilities landscape for charter schools. Over the next few months, however, CCSA is redoubling its facilities related efforts. We hope we can count on you to assist us in making the case that all California children deserve adequate and equitable educational facilities.

The CSFI survey will research and quantify charter school access to adequate educational facilities space and funding in California and we will use it to develop a blueprint of public policy and private sector changes leading to a comprehensive long-range system of adequate and equitable charter school facilities. Similar surveys and reports have been conducted in 13 states, and the results have allowed those states to make legislative and policy gains to enhance the quality financing and availability of facilities to their charter schools. Please visit www.facilitiesinitiative.org to see the state reports and to learn more about this project.

In order to make this a successful endeavor in California your participation in the upcoming survey will be essential. We would like to achieve an 85% participation rate for this national initiative and we need your support!

More information will be coming soon—including an update for those charter schools who completed a version of the survey in 2012—2013. Please feel free to contact Project Manager xxxx directly for more information or with any questions at (XXX) XXX-XXXX OR EMAIL.

Sincerely,

Jed Wallace
President and CEO
California Charter Schools Association

4. SAMPLE EMAIL: TIPS TO MAKE SURVEY COMPLETION MORE EFFICIENT

Dear _____,

Thank you in advance for taking the time to complete the [insert state] Charter School Facility Survey.

The following steps are the simplest way that others have found to more efficiently complete the survey.

1. Read through the survey questions and write down any questions that arise.
2. Gather the following items before beginning the survey:
 - a. Current enrollment information for your school, including FTE count and total student count.
 - b. Actual utilities costs for the most recent Fiscal Year.
 - c. Current facility loan and/or rent payments.
 - d. Information about participation in local or state capital fund programs.
3. Complete the questions you can, and highlight questions for which you need assistance.
4. Create a list of all rooms in your school, and obtain a building (floor) plan and an emergency exit plan.
 - a. On the list please indicate the grade(s) served and maximum number of students served at one time for each room.
 - b. If a room is used for more than one purpose, that should be indicated on the list as well.
 - c. Administrative spaces (front office, principal's office, etc.) do NOT need to be included in the list, as they will not be measured.
5. Mail or email these documents (from step 3) to your CSO at: [INSERT EMAIL ADDRESS OR MAILING ADDRESS].
6. Inform your office staff that you will be receiving a phone call from a CSO staff or consultant. When the call is received, please schedule an appointment for the staff/consultant to come to your school to take measurements of your school building.
7. When the CSO staff/consultant arrives at your school to take measurements, take this opportunity to ask them the questions you identified (in step 1). They will also be available to assist you in answering the survey questions you highlighted in step 1.

If you need any assistance with completing the survey, please contact _____ at [state association] at _____.

Sincerely,

CSO Executive Director

4. SAMPLE REMINDER EMAIL – CUSTOMIZED FOR EACH SCHOOL (FOR ALL SCHOOL SIZES) – Version 1

Subject: Please Help [School Name] and All Other [INSERT STATE] Charter Schools Receive Facilities Funding

One of the greatest challenges charter schools face is access to adequate facilities. Below is a link to a comprehensive [INSERT STATE] charter school facilities survey. We ask you to set approximately 1 to 1.5 hours aside to complete this survey. We know this a great deal of time out of your busy schedule, but the results should dramatically change the policy environment and improve support for the varied facility needs of charter schools throughout the state.

[INSERT CSO NAME] is committed to fully supporting you in completing this survey. In fact, we will follow-up with you in the coming days to determine the support you need to complete this survey. In addition, a staff or consultant from our office will be contacting you to set up an appointment so we can come to your school to take measurements of your building, answer any questions you may have, and assist you with completing the survey.

To access the facilities survey click on the link below and enter the user name and password provided.

Survey link: [INSERT LINK]

User Name: [INSERT USER NAME]

Password: [INSERT PASSWORD]

In order to use your time efficiently, please gather the following before beginning the survey:

1. Current enrollment information, including FTE count and total student count.
2. Actual utilities costs for 2013-14.
3. Current facility loan and/or rent payments.
4. Information about participation in local or state capital fund programs.
5. Create a list of all rooms in your school, and obtain a building (floor) plan and an emergency exit plan.
 - a. On the list please indicate the grade(s) served and maximum number of students served at one time for each room.
 - b. If a room is used for more than one purpose, that should be indicated on the list as well.
 - c. Administrative spaces (front office, principal's office, etc.) do NOT need to be included in the list, as they will not be measured.

If you have any questions, or need additional information in order to get started on the survey, please contact:

[INSERT NAME, TITLE, EMAIL ADDRESS AND PHONE OF CONTACT PERSON]

Thank you for helping us get you the facilities funding you deserve!

Sincerely,

CSO Executive Director

5. SAMPLE REMINDER EMAIL (BEST FOR SCHOOLS WITH EMO/CMOS – CAN BE CUSTOMIZED FOR SCHOOLS OF ALL SIZES) – Version 2

Subject: [INSERT STATE] Facilities Survey

Dear [Principal and/or CMO/EMO Executive],

After reviewing charter school feedback from our legislative priorities survey, we know one of the most important issues to you is adequate funding for your facilities. You spoke, we listened, and now we have a chance to advance this issue for [INSERT STATE] Charter Schools. We have been selected to work with the National Alliance for Public Charter Schools and the Colorado League of Charter Schools to gather the most comprehensive and reliable data for charter facilities in our state. [INSERT STATE] charter schools are spending a significant amount of operating dollars to cover facilities costs that could otherwise be spent on the students. Our push for facilities funding can be intensified once we know the exact scope of the problem. The undeniable facts reported through this survey will be used to illustrate the funding disparity to [INSERT STATE] legislators.

For CMO/EMOs

The survey [INSERT LINK TO SURVEY] will be sent directly to each of your campus principals, as the goal of the survey is to measure each campus individually.

For Principals

As the leader of your campus, we are asking you to make this a priority at your school. The deadline for completing the survey is [INSERT DATE].

Survey Access

Below is the link to the survey and the school's user name and password to access the survey.

[INSERT LINK TO SURVEY]

User name: [INSERT USER NAME]

Password: [INSERT PASSWORD]

Survey Tools & Tips

In order to use your time efficiently, please gather the following before beginning the survey. **Note: please provide this information for each individual school campus, not for the entire charter school network.**

1. Current enrollment information, including FTE count and total student count.
2. Actual utilities costs for 2013-14.
3. Current facility loan and/or rent payments.
4. Information about participation in local or state capital fund programs.
5. Create a list of all rooms in your school, and obtain a building (floor) plan and an emergency exit plan.
 - a. On the list please indicate the grade(s) served and maximum number of students served at one time for each room.
 - b. If a room is used for more than one purpose, that should be indicated on the list as well.
 - c. Administrative spaces (front office, principal's office, etc.) do NOT need to be included in the list, as they will not be measured.

Contacts and Support

We will follow-up with you in the coming days to determine the support you need to complete this survey. In addition, a staff or consultant from our office will be contacting you to set up an appointment so we can come to your school to take measurements of your building, answer any questions you may have, and assist you with completing the survey.

If you have any questions, or need additional information in order to get started on the survey, please contact:

[INSERT NAME, TITLE, EMAIL ADDRESS AND PHONE OF CONTACT PERSON]

Thank You for Helping us Make the Case for Facility Funding!

Sincerely,

CSO Executive Director

P.S. Visit www.facilitiesinitiative.org to learn more about this project.

6. SAMPLE REMINDER EMAIL – SCHOOLS OF ALL SIZES – Version 3 (Customizable for each individual school)

Subject: [INSERT SCHOOL NAME] Has Not Completed the [INSERT STATE] Charter School Facilities Survey

Dear [INSERT SCHOOL LEADER NAME]

I hope you received the original distribution of the [INSERT STATE] Charter School Facilities Survey on [INSERT DATE SURVEY WAS SENT].

In the event that you did not receive the original e-mail, or it got lost in the shuffle, we are resending the facilities survey link. To aid you in the completion of the survey, we have also mailed you a printed version of the survey. I hope that you have found these resources helpful.

We realize that this survey requires a bit of a time commitment. However, your completion of the survey will result in potentially dramatic changes to the future policy environment for the facilities needs of [INSERT STATE] charter schools. It is essential that every school complete this survey, and do so as thoroughly as possible.

To access the survey click on this link [INSERT LINK TO SURVEY]
then enter [ENTER USER NAME] as your user name
and enter [ENTER PASSWORD] as your password.

Please do not hesitate to contact [INSERT CONTACT NAME] via e-mail at [INSERT EMAIL ADDRESS] if you have any questions or concerns. Thank you very much for your participation!

Thank you in advance for your participation!

CSO Executive Director

P.S. Visit www.facilitiesinitiative.org to learn more about this project.

7. SAMPLE CALLING SCRIPT FOR CSO STAFF/CONSULTANT TO SCHEDULE APPOINTMENT TO TAKE MEASUREMENTS OF SCHOOLS

Facilities Project Call Script

Introduction

This is _____ calling on behalf of the [INSERT CSO NAME].

Recently, the [INSERT CSO NAME] emailed you about a Facilities Initiative that will dramatically reshape the charter school facilities landscape in [INSERT STATE]. Did you receive that email?

If yes, continue to Part 1.

If no, go to Part 2

Part 1

Great, so you understand that we are trying to address the issue of equitable access to facilities and facilities funding for charter schools in [INSERT STATE].

We would like to make an appointment to come to your site and conduct a detailed measurement of the entire school facility. I will need between one and 1.5 hours to complete the measurements; however, each classroom measurement only takes 1-2 minutes.

What date and time works best for you?

Schedule a time.

If they hesitate or say that the timing is not good. Ask when a better time would be.

Callback date: _____ **Callback time:** _____

If still object, ask why not and note objections, then provide to the CSO for follow-up.

School Name: _____

Day: _____

Date: _____

Time: _____

Go to Part 1a

Part 1a

Thank you for your participation. Prior to our appointment, we ask that you do the following:

1. Go to the url (csfi.civcore.com) that was provided in the introductory email and set up your user name and password.
2. Begin the online survey, noting any questions you have so that I may assist you during our appointment.
3. Have an emergency exit floor plan ready for me to use as I go through the facility.
4. Please indicate on the floor plan the grade(s) served and largest number of students served at one time for each classroom and instructional space.

If a room is used for more than one purpose, that should be indicated on the list as well.

Administrative spaces (front office, principal’s office, etc) do NOT need to be included in the list, as they will not be measured.

We will send you a confirmation email with this information along with instructions on how to send us this information, as well as how to contact us with any questions or if you need to reschedule the appointment.

In addition, we will give you a courtesy call the day before the appointment to confirm. Are you the person we should contact, or would you prefer we speak with another member of your staff moving forward? Can we confirm your (or other staff member’s) phone number and email address?

Corrected name: _____

Corrected phone number: _____

Corrected email address: _____

Part 2

Time and time again, [INSERT STATE] charter school leaders have expressed that facilities challenges (quality, availability, and cost) are a top priority and concern. Over the next few months, the [INSERT CSO NAME] is redoubling its facilities related efforts. We need your help to assist us in making the case that all [INSERT STATE] children deserve adequate educational facilities.

The [INSERT CSO NAME] is partnering with the Colorado League of Charter Schools and the National Alliance for Public Charter Schools to develop and implement a comprehensive facilities survey and accompanying report on the state of [INSERT STATE] charter school facilities.

The Facilities Initiative will identify prominent shortcomings in current capital landscape, and develop a blueprint of public policy and private sector changes leading to a comprehensive long-range system of adequate public school facilities.

Similar surveys and reports have been conducted in 14 states to date, and the results have allowed those states to make legislative and policy gains to enhance the quality financing and availability of facilities to their charter schools.

Our goal is to provide policymakers with solid data that shows that [INSERT STATE] charter schools are spending a large portion of their operational funds on facilities, cutting into budgets that would otherwise be spent on teachers and instructional materials.

To collect the data needed we would like to schedule a time to come out to your school and take measurements of your facility. You will also be asked to take 30-45 minutes to complete an online survey.

What date and time works best for you? I will need between one and 1.5 hours to complete the measurements; however, each classroom measurement only takes 1-2 minutes.

Schedule a time.

If they hesitate or say that the timing is not good. Ask when a better time would be.

Callback date: _____ **Callback time:** _____

If still object, ask why not and note objections, then provide to the CSO for follow-up.

School Name: _____

Day: _____

Date: _____

Time: _____

Go to Part 1a

Notes:

8. SAMPLE NEWSLETTER BLURBS

HELP ENSURE THAT ALL [INSERT STATE] CHARTER SCHOOLS HAVE EQUAL ACCESS TO FACILITIES

Complete the Survey Today!

Time and time again, [insert state] charter school leaders have expressed that facilities challenges (quality, availability, and cost) are a top priority and concern.

Now you can help us reshape the charter school facilities landscape in [INSERT STATE].

Please complete the facilities survey today!

Results from the survey will help identify prominent shortcomings in current capital landscape, and develop a blueprint of public policy and private sector changes leading to a comprehensive long-range system of adequate public school facilities.

Similar surveys and reports have been conducted in 14 states to date, and the results have allowed those states to make legislative and policy gains to enhance the quality financing and availability of facilities to their charter schools.

We must have at least 85% survey participation from [INSERT STATE] charter schools to make this data meaningful.

Please be sure to return your survey before the deadline of [INSERT DEADLINE].

If you have any questions or require assistance with the survey, please contact [INSERT NAME AND CONTACT INFORMATION].

Help Shape Public Policy: Participate in the Facilities Survey!

EXCERPT:

Our effort to shape a policy environment where every charter school in California has access to an adequate, affordable facility begins with our developing an accurate picture of where our state's charter schools are today.

FULL VERSION:

We need your data! Our effort to shape a policy environment where every charter school in California has access to an adequate, affordable facility begins with our developing an accurate picture of where our state's charter schools are today. CCSA recognizes that facilities are an essential component to the success of a charter school, and the data collected from the [Facilities Initiatives Survey](#) will help us to better advocate for charters to secure and retain long term, high-quality, affordable school space.

The online questionnaire takes between 35 minutes to 1 hour to complete. **We encourage all schools to complete the survey by July 31.** Please contact XXXXX for more information.

Support Facilities Policy Efforts: Complete the Facilities Survey Today!

EXCERPT:

We are gathering some critical data from schools to help us with facilities policy work on your behalf.

FULL VERSION:

Contribute to the charter school movement and participate in CCSA's easy [Facilities Initiatives Survey](#)! One of the greatest challenges charter schools face is access to adequate facilities. And so facilities solutions are one of CCSA's important priorities this year. The Facilities Initiatives Survey will help us to gather important data as the legislature may soon consider a Statewide School Facilities Bond.

The online questionnaire takes between 35 minutes to 1 hour to complete. **We encourage all schools to complete the survey by July 31.** Please contact XXXXX for more information.

It's as easy as 1-2-3! Fill Out the Facilities Survey Online Today

EXCERPT:

Throughout the state, a large number of charters continue to struggle in acquiring and financing adequate school facilities. Help us to better advocate for charters to secure and retain long term, high-quality, affordable school space by taking the Facilities Initiatives Survey.

FULL VERSION:

We need your input! CCSA recognizes that facilities are an essential component to the success of a charter school, and the data collected from the [Facilities Initiatives Survey](#) will help us to better advocate for charters to secure and retain long term, high-quality, affordable school space. The online questionnaire t takes between 35 minutes to 1 hour to complete. **We encourage all schools to complete the survey by August 30.** Learn more about CCSA's facilities work and the Initiative by [visiting our website](#). Please contact XXXX for more information.

Don't Forget to Add the Facilities Survey to Your Back to School to Do List!

EXCERPT:

The Facilities Initiatives Survey will help us to gather important data as the legislature may soon consider a Statewide School Facilities Bond.

FULL VERSION:

The participation of charter schools in the [Facilities Initiatives Survey](#) is vital to its success and to obtain accurate data. The collected data will be analyzed and used in materials supporting our policy efforts to address many challenges charter schools face, including limited state funding, expensive private leases, and school districts obstructing the ability of charter schools to acquire available campus space.

The Facilities Initiatives Survey will help us to gather important data as the legislature may soon consider a Statewide School Facilities Bond. The online questionnaire takes between 35 minutes to 1 hour to complete. **We encourage all schools to complete the survey by August 30.** Please contact XXXX for more information.

Don't Miss Your Chance to Participate in the Facilities Survey!

FULL VERSION:

The [Facilities Initiatives Survey](#) aims to collect data to complete a comprehensive analysis of the issues and challenges facing California's charter schools and their access to affordable, adequate facilities. Throughout the state, a large number of charters continue to struggle in acquiring and financing adequate school facilities. The online questionnaire takes between 35 minutes to 1 hour to complete. **We encourage all schools to complete the survey by August 30.** Please contact XXXX for more information.

Charter School Facilities Initiatives Survey: Take it Today!

EXCERPT:

The Facilities Initiatives Survey helps us to collect important data as the legislature may soon consider a Statewide School Facilities Bond.

FULL VERSION:

The Facilities Initiatives Survey gathers important data as the legislature may soon consider a Statewide School Facilities Bond. The survey is easy to complete and your data is vital to provide comprehensive analysis of the issues and challenges facing California's charter schools and their access to affordable, adequate facilities. **We encourage all schools to complete the survey by August 30.** [Take the survey here!](#)

Learn more about CCSA's facilities work and the Initiative by [visiting our website](#). Please contact XXXX if you have any questions.

Fill Out the Facilities Survey Today

EXCERPT:

Our effort to shape a policy environment where every charter school in California has access to an adequate, affordable facility begins with our developing an accurate picture of where our state's charter schools are today.

FULL VERSION:

CCSA'S [Facilities Initiatives Survey](#) aims to collect data to develop a comprehensive analysis of the issues and challenges facing California's charter schools and their access to affordable, adequate facilities. The Facilities Initiatives Survey will help us to gather important data as the legislature may soon consider a Statewide School Facilities Bond. The online questionnaire takes between 35 minutes to 1 hour to complete. Learn more about CCSA's facilities work and the Initiative by [visiting our website](#). Please contact XXXX for more information.

9. SAMPLE FACT SHEET

Charter school laws across the country place the burden of obtaining and paying for facilities on the charter schools themselves. As a result, charter schools often struggle to find suitable and affordable facilities, and charter leaders routinely identify facilities as one of their top challenges of running a school.

Recently, 14 Charter Support Organizations across the U.S. have commissioned a comprehensive charter school facility study in their states. The results of the project have provided hard evidence and disturbing findings about charter school access to adequate facilities, many of which share a similar theme, such as:

- Charter schools are the only public schools forced to spend operating revenue on facilities.
- Many charter schools have limited capacity to serve federally-subsidized meals for students from lower-income families.
- Charter school facilities are too small in comparison to relevant standards.
- State grant funding for public school facilities has provided insufficient benefit for charters.
- Local and state capital funding programs are not a significant source of funding for charter school facilities.
- Not all districts are willing to share unused land or facilities with charter schools.
- Physical education and recreational options are limited for charter school students.

As evidenced above, charter schools across the nation struggle with inadequate and costly facilities. Based in part on policy gains in other states following the publication of survey results, [INSERT STATE] has decided to follow suit and is participating in a national charter school facilities initiative. The collective results of the survey will be used to help effect change around charter school facility access and funding at both a state and national level.

Hard data is much more effective than anecdotal data when it comes to convincing law makers to provide charter schools with equitable access to facilities. As such, we need all charter schools in [INSERT STATE] to participate in this important survey so that we can enter the next legislative session armed with powerful evidence to show that public charter school students are not receiving access to the facilities they deserve in order to receive the best education possible.

For more information on this important endeavor, or to request a link to the survey, contact [INSERT NAME AND CONTACT INFORMATION].

Visit www.facilitiesinitiative.org to see the state reports completed to date, and to learn more about this project.

10. SAMPLE BLOG POST WITH REFERENCE TO PROMOTIONAL CONTEST TIED TO CSO STATE CONFERENCE

Charter School Facilities Survey at 21st Conference + Chance to Win!

The California Charter School Association (CCSA) is partnering with the Colorado League of Charter Schools and the National Alliance for Public Charter Schools on a U.S. Department of Education National Charter Schools Facilities Initiative survey. The survey gathers research and quantifies charter school access to adequate educational facilities space and funding.

The survey has two parts:

- Part 1 is online and addresses General Facility Information and Facility Expenditure and Revenue
- Part 2 is onsite in which we will send someone to measure your Facility and Instructional Spaces

Learn more about the survey from representatives from the Colorado League of Charter Schools, Momentum Strategy and Research at the 21st Annual California Charter School Conference, March 3-6 in San Jose by either:

- Visiting CCSA's conference booth #715 in the exhibitors hall
- Stopping by Salon V in the Marriott Hotel, where you will also be able to take the survey and schedule an onsite visit
- Submit a pledge card by Wednesday, March 5 to take the survey and be entered for a chance to win one of four \$50.00 gift cards courtesy of Cunningham Group Architecture, Inc. (Pledge cards will be available at the CCSA booth and in the conference registration bags.)

In order to make this a successful endeavor in California your participation in the upcoming survey will be essential. We would like to achieve an 85% participation rate for this national initiative and we need your support!