

# Integration Layer Overview

## Whitepaper

Three integration profiles connecting schools, authorizers, network partners, and compliance programs under a common governance standard.

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This document provides an overview of CGMI's Integration layer — the three profiles that extend a school's maturity rating into the broader charter ecosystem. For the full framework specification, visit [www.cgmi.institute](http://www.cgmi.institute).

# 1 The Two-Layer Architecture

CGMI operates across two distinct layers. Understanding this separation is essential to understanding how the framework works — and why it is called Charter Governance Maturity & *Integration*.

Layer	What It Does	Specification	Determined by
<b>Part I — Maturity CGMI-F</b>	Determines how mature a school's governance is. Five domains, twenty practice areas, five levels, three appraisal tiers, Governance Maturity Score.	CGMI-F v1.0 Framework Specification	The school's own governance evidence
<b>Part II — Integration CGMI-A / CGMI-P / CGMI-C</b>	Connects the maturity rating to the broader charter ecosystem. Extends a school's rating into authorizer relationships, network portfolio management, and external compliance frameworks.	CGMI-F v1.0 Integration Profiles	The ecosystem participant that implements the profile

A school's maturity level is determined entirely by Part I criteria. Integration profiles govern how that level is *recognized and used externally* — they do not change the rating itself. A school at Level 3 is Level 3 regardless of whether any authorizer, network, or compliance program has adopted a CGMI integration profile.

## 2 Why Integration Matters

A maturity rating that exists in isolation has limited value. Charter school governance does not happen in isolation — it happens within an ecosystem of relationships: with authorizers who oversee schools, with network partners who manage portfolios of schools, and with compliance programs that set standards schools must meet.

The Integration layer ensures that when a school invests in improving its governance maturity, that investment is recognized by every participant in the ecosystem that matters. A single CGMI appraisal produces maturity ratings, compliance evidence, and authorizer-ready documentation — not three separate processes.

### Integration at a Glance

Profile	Connects to	Value for Schools
<b>CGMI-A Authorizer</b>	The authorizer relationship and charter renewal process	CGMI ratings carry weight in oversight reviews. Evidence packages formatted for authorizer submission. Schools at Level 4+ may qualify for reduced oversight frequency.
<b>CGMI-P Partner</b>	Network-level portfolio governance (CMOs, EMOs, network operators)	Network-wide maturity tracking. Systemic gap identification across schools. Governance anchor school designation for Level 4+ schools.
<b>CGMI-C Compliance</b>	Federal grants, NACSA standards, and state compliance frameworks	Pre-mapped CGMI criteria to CSP rubrics and NACSA standards. Appraisal reports serve as compliance evidence artifacts in grant applications and regulatory submissions.

### 3 CGMI-A: Authorizer Integration

CGMI-A is a formal integration protocol that enables charter authorizers to recognize and use CGMI maturity ratings in their oversight, renewal, and portfolio management processes.

#### What Authorizers Get

- Portfolio dashboard showing CGMI level distribution across all schools
- Level trend reporting by school and across the full portfolio
- Pre-formatted CGMI evidence packages from schools pursuing renewal
- Optional renewal criteria language: reference CGMI Level thresholds as a component of renewal evaluation
- Peer benchmarking: compare portfolio governance maturity against comparable authorizer portfolios

#### Level Thresholds for Authorizer Recognition

CGMI Level	Authorizer Implication
Level 1	Significant governance risk. Likely subject to compliance notices. Not suitable for renewal without remediation plan.
Level 2	Meets minimum compliance expectations. Satisfactory for renewal consideration.
Level 3	Strong governance. Positive indicator in renewal evaluation. CGMI-A formally activates at this level.
Level 4	Exemplary governance. May qualify for expedited renewal or reduced oversight frequency under CGMI-A protocols.
Level 5	Reference school. Authorizer may designate as a governance model for portfolio peers.

#### Most Active Framework Domains

**D3 — Strategic Oversight & Accountability.** Charter promise fidelity, leadership oversight, and academic accountability — the governance dimensions authorizers evaluate most closely in renewal.

**D5 — Transparency & Stakeholder Accountability.** The Authorizer Relationship practice area (D5.PA3) is the direct integration point — it defines what proactive, collaborative authorizer engagement looks like at each maturity level.

## 4 CGMI-P: Partner Integration

CGMI-P is a formal integration protocol that enables charter management organizations, education management organizations, and network operators to apply CGMI governance maturity tracking across their entire portfolio of schools.

### What Network Partners Get

- Network-wide maturity distribution dashboard: see every school's CGMI level in one view
- Domain capability profile comparison across schools: identify which domains are systemically weak across the network
- Governance gap prioritization: rank schools by advancement need and proximity to next level
- Network benchmarking: compare portfolio governance maturity to peer networks
- Anchor school designation: formally recognize Level 4 and Level 5 schools as governance mentors within the network

### Most Active Framework Domains

**D1 — Board Composition & Competency.** Networks can identify systemic succession planning and competency gaps across schools — a common failure mode in rapidly growing CMOs.

**D2 — Governance Processes & Compliance.** Compliance pattern analysis across the network surfaces systematic process failures before they become authorizer incidents.

**D4 — Financial Governance & Sustainability.** Network-level financial governance benchmarking identifies schools trending toward structural difficulty.

## 5 CGMI-C: Compliance Integration

CGMI-C is a mapping layer that formally connects CGMI maturity ratings and appraisal evidence to external accountability frameworks. Schools can use their CGMI appraisal report as a compliance evidence artifact in grant applications, authorizer submissions, and state accountability processes.

### Current CGMI-C Mappings

External Framework	CGMI Domains Mapped	Available at
<b>CSP Grant Rubric (Federal)</b>	D1 (Section H), D3 (Section A), D4 (Section F), D5 (Section E)	Level 2+
<b>NACSA Performance Framework</b>	D2 (Compliance), D3 (Oversight), D4 (Financial), D5 (Transparency)	Level 2+
<b>State-level mappings</b>	In development — state-specific criteria mapped per jurisdiction	—

### How CGMI-C Activates by Level

Level	CGMI-C Status	What It Means
<b>Level 1</b>	Diagnostic only	Identify which compliance frameworks are not yet satisfied by current governance maturity.
<b>Level 2</b>	<b>Full activation</b>	Appraisal report can be submitted as compliance evidence for all mapped frameworks.
<b>Level 3–4</b>	<b>Enhanced</b>	Appraisal report carries stronger evidentiary weight. Compliance exhibit package included in Guided or Certified Appraisal output.
<b>Level 5</b>	<b>Enhanced — Certified</b>	Full compliance artifact set. Level 5 requires a Certified Appraisal, which produces the highest evidentiary weight.

### What the CGMI-C Compliance Exhibit Contains

Generated at Guided Appraisal close for Level 2+ schools:

- Cross-reference table: CGMI criteria mapped to specific external framework requirements
- Evidence citations: which appraisal findings satisfy which external criteria
- Gap notation: external requirements not satisfied by current CGMI level, with advancement pathway
- Submission-ready formatting: structured for direct attachment to CSP applications and NACSA submissions

## 6 Integration Designations

Integration designations are available to ecosystem participants — not just schools. Authorizers, network partners, compliance programs, and individual practitioners can each pursue a formal CGMI designation that signals their commitment to the governance standard. All designations are issued by CGMI and subject to annual renewal.

Designation	Awarded to	What It Signals	Annual Renewal
<b>CGMI-A Recognized Authorizer</b>	Charter authorizer	Has formally adopted CGMI-A protocols in oversight and renewal. Authorizer staff have completed CGMI-A orientation training. Processes established for receiving CGMI evidence packages.	Confirmation of continued protocol use
<b>CGMI-P Recognized Network Partner</b>	CMO / EMO / network operator	Has implemented CGMI-P portfolio governance tracking. Minimum 3 schools enrolled in a CGMI-recognized governance program with at least one Guided Appraisal per school.	Continued enrollment above minimum threshold
<b>CGMI-C Aligned Program</b>	State association / grant program	Has formally mapped program requirements to CGMI criteria. Program has published guidance indicating CGMI appraisal reports are acceptable evidence artifacts.	Confirmation of continued mapping alignment
<b>CGMI-CA Certified Appraiser</b>	Individual practitioner	Credentialed to conduct official CGMI Certified Appraisals. Trained through the CGMI Certified Appraiser program. Can appraise at any level (1–5).	Active appraisal activity + continuing education

## 7 Integration Outputs by Appraisal Tier

Integration outputs are generated automatically for schools at Level 2 and above. No additional appraisal work is required — Integration artifacts are produced from the same evidence base as the maturity determination. The appraisal tier determines which integration artifacts are generated.

Appraisal Tier	Maturity Output	Integration Output
<b>Self-Assessment (Level cap: 2)</b>	Self-attested domain ratings	<b>CGMI-C diagnostic:</b> identifies which compliance frameworks current level satisfies. Informational only — not submission-ready.
<b>Guided Appraisal (Level cap: 4)</b>	Maturity Appraisal Report + Level Certificate	<b>CGMI-A evidence package</b> (authorizer-formatted) + <b>CGMI-C compliance exhibit</b> (submission-ready for CSP and NACSA). Full domain ratings with evidence citations.
<b>Certified Appraisal (No cap — required for L5)</b>	Official level rating + appraiser-signed report	<b>Full CGMI-A, CGMI-P, and CGMI-C artifact set</b> — complete integration-ready package. Highest evidentiary weight. Appraiser-validated evidence. Required for Level 5.

A single appraisal, multiple outputs. Schools do not need to undergo separate processes for maturity rating, authorizer evidence, and compliance documentation. The Integration layer transforms one body of governance evidence into outputs formatted for every audience that needs it.

## 8 Activation by Maturity Level

Each integration profile activates at a specific maturity level and gains additional capabilities as a school's governance maturity increases. The table below shows the status of each profile across all five levels.

Level	CGMI-C Compliance	CGMI-A Authorizer	CGMI-P Partner
<b>L1 Emerging</b>	Diagnostic only	Not active	Not active
<b>L2 Developing</b>	<b>Active — report accepted as compliance evidence</b>	Eligible — meets minimum compliance	Tracking — network monitoring begins
<b>L3 Established</b>	<b>Active — Enhanced evidentiary weight</b>	<b>Active — formally recognized in authorizer oversight</b>	Tracking — eligible for peer support
<b>L4 Advanced</b>	<b>Active — Enhanced full artifact set</b>	<b>Active — Distinguished may qualify for expedited renewal</b>	<b>Active — Anchor eligible</b>
<b>L5 Exemplary</b>	<b>Active — Enhanced reference-quality (requires CA)</b>	<b>Active — Exemplar reference school (requires CA)</b>	<b>Active — Anchor governance mentor (requires CA)</b>

Note: "CA" refers to Certified Appraisal. Level 5 requires a Certified Appraisal for all integration profiles — ensuring the highest ratings carry the highest evidentiary standard.

## 9 Pursuing a Designation

Each integration designation follows a standardized process. Requirements vary by designation type, but all follow the same general pattern.

### CGMI-A Recognized Authorizer

#### Requirements:

- ✓ Authorizer has reviewed and accepted the CGMI-A protocol documentation
- ✓ At least one authorizer staff member has completed CGMI-A orientation training
- ✓ Authorizer has established a process for receiving and reviewing CGMI evidence packages
- ✓ Authorizer has committed to referencing CGMI ratings in at least one formal oversight process

**Process:** Inquiry → Orientation session → Recognition Agreement signed → Designation issued → Annual renewal

### CGMI-P Recognized Network Partner

#### Requirements:

- ✓ Network operator has enrolled a minimum of 3 schools in a CGMI-recognized governance program
- ✓ At least one Guided Appraisal completed per enrolled school
- ✓ Network governance officer has completed CGMI-P orientation training
- ✓ Network has established a governance improvement process that references CGMI ratings

**Process:** Inquiry → Portfolio review → Recognition Agreement signed → Designation + dashboard activated → Annual renewal

### CGMI-C Aligned Program

#### Requirements:

- ✓ Program has reviewed the CGMI-C mapping documentation for their framework
- ✓ Program staff have completed a CGMI-C alignment review session with CGMI
- ✓ Program has published guidance indicating CGMI appraisal reports are acceptable evidence

**Process:** Contact CGMI → Alignment review → Mapping published → Listed as Aligned Program → Schools use reports as evidence

### CGMI-CA Certified Appraiser

The CGMI Certified Appraiser program will train and credential human appraisers to conduct formal CGMI ratings on behalf of schools, authorizers, and networks. The program will include a training curriculum, credentialing examination, and ongoing continuing education requirements. Registration will open in a future phase.

Interest inquiries: [cgmi@chartervision.org](mailto:cgmi@chartervision.org)

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#### CGMI · Charter Governance Maturity & Integration

For the full framework specification, visit [www.cgmi.institute](http://www.cgmi.institute)

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