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**Transfer Application**

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Page numbers within the Table of Contents will not automatically update. Therefore, please use this Table of Contents as a guide for understanding how this document is organized. You can click on any item below (ex: Applicant Eligibility, Application Components, etc.) to be taken to that section of the document.

Page numbers at the bottom of each page will automatically update. Therefore, once you have responded to all applicable items within this document, please identify below the page number that each section of the application begins on. You do not need to provide page numbers for the introductory, instructional pages (Applicant Eligibility through Application Instructions). Once you’ve added page numbers, please print this document to be included in the printed version of your application materials.

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# Introduction

The Colorado Charter School Institute (CSI) is committed to fostering high-quality charter schools. We understand charter schools and advocate for their success. We offer support, flexibility, and transparent accountability to ensure our schools are in the best position possible to serve their students. This vision is reflected in our approach to requests for charter school expansions.

# Transfer Evaluation

The primary method for evaluation of a school wishing to transfer authorization to CSI is through the CSI Annual Review of Schools (CARS) system. This system was developed in order to build upon the evaluation lens utilized by the State and to provide a more comprehensive and robust evaluation that includes strong indicators of charter viability and sustainability. At the foundation of this evaluation are the CSI Performance Frameworks (available at [www.csi.state.co.us/accountability](http://www.csi.state.co.us/accountability)). These documents were developed in conjunction with the National Association of Charter School Authorizers (NACSA) to evaluate school performance in the areas of academics, finance, and organization.

At the foundation of this evaluation are the CSI Performance Frameworks (available at www.csi.state.co.us/accountability). These documents were developed in conjunction with The National Association of Charter School Authorizers (NACSA) to evaluate school performance in the areas of Academics, Finance, and Organization.

# Transfer Application Process

Transfer applications should focus on providing evidence of the performance of the existing school. The application should be as concise as possible. All requested documentation should be provided as attachments to the narrative. This includes any specific, documented evidence, tables, statistics, and other information which may require elaboration beyond the scope of the narrative. CSI may request additional information during the review period. CSI may, but is not required to, accept any additional information the applicant provides that is not specifically requested.

## Transfer Application Timeline

Schools should submit transfer application materials in accordance with the timelines established annually by the CSI Board and Staff, unless waived. The standard transfer application timeline includes application submission in January and CSI board action on the transfer application in March.

## Applicant Eligibility

An application may only be submitted by an existing charter school. Private schools and current non-charter public schools may not apply to CSI through this process.

CSI can authorize charter schools in:

1. districts that do not retain exclusive chartering authority (ECA), and
2. districts that retain ECA but have or are willing to release an Applicant to CSI or waive ECA through a board resolution.

A list of districts with their chartering authority status can be found on the CDE website: [www.cde.state.co.us/cdechart/distauthinfo](http://www.cde.state.co.us/cdechart/distauthinfo). For applicants planning to locate in a district with exclusive chartering authority, please be sure you have already communicated with the geographic district about the potential to seek authorization with CSI. *Please note, the CSI Board will be unable to act on an application unless the Board of Education of the geographic district releases the applicant.*

## Submission of Application Materials

All application materials—application, required attachments, applicable addenda, geographic district notification, etc.—must be submitted to CSI electronically. The Applicant must address all items within this Transfer Application. **Please limit your responses so that the completed version of this Transfer Application document does not exceed 75 pages.**

To confirm that you have reviewed your application for completeness before submitting to CSI, the Application Checklist contained within this document should be submitted along with the application.

If the Applicant would like to provide additional attachments to supplement information provided in the application narrative or to provide additional information that is not required as part of the Transfer application, the additional attachments should be clearly referenced within the Transfer Application Narrative by filename and/or document title/page number. The CSI Review Team is not required to review information that is not requested as part of the Transfer application process.

## Completeness Check

An application is considered filed when the Institute receives the application. Within 15 days of receiving an application, CSI shall determine whether the application satisfies the requirements listed in the Application Checklist and is therefore complete. If the application is not complete, CSI shall notify the applicant within the 15-day period and provide a list of the information required to complete the application.

The applicant has 15 days after the date it receives the notice to provide the required information to CSI for review. Upon submission of a complete application, the 90-day clock between application receipt and Board vote begins. The Institute is not required to take action on the application if the applicant does not provide the required information within the 15-day period. CSI may request additional information during the review period and provide reasonable time for the applicant to respond.

## Request for Clarification

Applicants will receive a list of questions based on the initial review of the application by the CSI Review Team, which is made up of CSI staff as well as one or more external reviewers. Questions are developed around areas of the application that are unclear or are of concern to one or more members of the CSI Review Team. The Request for Clarification is an opportunity for the Applicant to clarify information provided in the application early in the review process. Applicants will have about a week to respond to the questions in writing. Please note, the Request for Clarification will not be used to ask for missing or incomplete items. Rather, this process is used to clarify information in the already submitted materials.

## Applicant Community Meeting

Applicants are required to host a meeting in the community of the proposed school, to be determined by the Applicant and communicated with CSI. A CSI representative, serving as a designee of the CSI Board, will be in attendance. The meeting serves as an opportunity for applicants to engage the community by sharing information about the proposed school and addressing questions and concerns from the community. It also allows the CSI Review Team to gather information to inform its recommendation.

## Applicant Interview

The Applicant will be interviewed by the CSI Review Team. The date and time will be finalized once the application has been deemed complete. The Applicant should bring as many members of the school leadership team, governing board etc. to ensure the team can respond to questions across all sections of the application.

## Applicant Presentation to CSI Board

Applicants will present a 15-minute summary of the proposed transfer school to the CSI Board’s Performance Management Committee during a public hearing.Following the presentation, there will be an opportunity for members of the Board to ask questions directly of the Applicant.

## CSI Board Performance Management Committee Discussion

CSI staff will publicly share the report and review team recommendation with members of the CSI Board at a Performance Management Committee meeting. Applicants will receive a copy of the CSI Review Team’s report and recommendation in advance of the meeting. During this meeting, CSI staff will provide an overview of the recommendation narrative to members of the Performance Management Committee and engage in discussion with committee members. Committee members may pose questions to both CSI staff and members of the Applicant Team during the 15-30-minute discussion. Applicants should plan to attend this meeting in person or virtually.

## CSI Board Action

The CSI Board, in a public hearing, will rule on the application. The CSI Board can vote to approve, conditionally approve, or deny the application.

|  |  |
| --- | --- |
| **Summary of the Transfer Application Process Components** | **Date/Deadline** |
| Letter of Intent Due | November |
| Application Due | December |
| Applicant Geographic Meeting | January or February, Date TBD by Applicant |
| Applicant Interview | Early February, Date TBD by Applicant and CSI |
| Applicant Presentation to CSI Board Performance Management Committee | February |
| Applicant Presentation to CSI Board | February |
| CSI Board Discussion of Recommendation | March |
| CSI Board Action | March |

***Please not******e that the CSI Executive Director may grant or deny a timeline waiver request for transfer applications provided the request is reasonable, that such timeline waiver does not interfere with CSI’s ability to execute its application processes in line with statutory requirements and best practice, and that the applicant demonstrates a legitimate need for the timeline waiver.***

# Application Components

The following components are required in order for an application to be deemed complete. A more detailed listing of application components can be found in the Application Checklist.

* Transfer Application Narrative

Unless otherwise noted, Applicants must complete all items in this Transfer Application Narrative. Please respond directly below each application question. Do not delete any questions or instructions from this document.

* Required Attachments

As detailed in the Transfer Application Narrative, some sections of the application require the Applicant to submit additional, supporting documentation (ex: the Governance & Operations and Evidence of Need, Support sections). Additionally, an Applicant may be required to submit one or more Addenda based on the proposed school’s model and as determined by responses in the Letter of Intent. A description of two of the required attachments are included below. Please see the Application Checklist or Transfer Application Narrative for a comprehensive list of required attachments.

* Notice to Geographic District

On or before submitting the application to CSI, the Applicant shall provide notice that it is submitting a Transfer application to CSI to the Board of Education and District Accountability Committee (DAC) of the geographic district in which it is proposing to locate. The Applicant shall provide the Institute proof that it has given such notice as part of its application submission. Such proof may consist of a certified mail receipt, a hand written receipt or other written acknowledgement from the recipient that written notification was provided. Failure to provide the district with notice of the application will result in denial of the application by CSI.

Upon determining it has received a complete application, CSI will make the complete application available on the CSI website. CSI will also post on its website the schedule by which the application will be evaluated and voted on, the details of the geographic meeting, instructions regarding how the school may request additional information, and an invitation of the local board to send any concerns regarding any portion of the application. The Board of Education and District Accountability Committee may each comment on the application, amendment or supplement to the Institute, in writing, within 30 days of receiving notice from CSI of the submission.

* Board Resolution from Districts Retaining Exclusive Chartering Authority

For charter schools proposing to locate in districts that have retained exclusive chartering authority (ECA), a resolution from that district’s Board of Education releasing the school to apply to CSI will be required before the CSI Board can formally consider (i.e. vote on) the application. A list of districts with their chartering authority status can be accessed from the Colorado Department of Education’s website: [www.cde.state.co.us/cdechart/distauthinfo](http://www.cde.state.co.us/cdechart/distauthinfo). Applicants proposing to locate in districts that do not have exclusive chartering authority may submit a proposal directly to CSI without seeking the consent of the geographic district. However, all Applicants should still provide the geographic district notice of its application to CSI. If the Applicant is in the process of attaining the required resolution from the geographic district’s Board of Education, documentation detailing where the Applicant is in the process and the anticipated date of receiving the geographic district’s board resolution should be included.

* Signed School Board Resolution Expressing Intent to Apply to CSI

Applicants must provide a signed local school board resolution expressing intent to apply to transfer authorization to CSI.

# Application Checklist

The Application Checklist should be used by the applicant to ensure all sections of the Transfer Application as well as any required supporting documentation have been completed. The CSI Review Team will also use this checklist during the Completeness Check process. *Note - Please click on each application component to be taken to the corresponding section/requirement of the Transfer proposal.*

|  |  |  |
| --- | --- | --- |
| **Application Components** | **Applicant Check** | **Reviewer Check** |
| [**Letter of Intent**](#h.3bj1y38)  | [ ]  | [ ]  |
| **Transfer Application Narrative**Items to be completed that are found within the Transfer Application Narrative. |  [Executive Summary](#_Executive_Summary) | [ ]  | [ ]  |
| 1. [Academic](#_A._Vision_and) Program
 | [ ]  | [ ]  |
| 1. [Student Services](#_A._Vision_and)
 | [ ]  | [ ]  |
| 1. [Finance](#_C._Education_Program)
 | [ ]  | [ ]  |
| 1. [Governance](#_D._Leadership) & Operations
 | [ ]  | [ ]  |
| 1. [Evidence](#_E._Serving_Students) of Need, Support
 | [ ]  | [ ]  |
| **Required Attachments**Items to be completed that require the applicant to create separate attachments |  [Notice to Geographic District](#noticetodistrict)  | [ ]  | [ ]  |
|  [Geographic District Board Resolution](#BoardResolution) *if applicable* | [ ]  [ ] N/A | [ ]  [ ] N/A |
|  [Signed School Board Resolution](#_Application_Components) | [ ]  | [ ]  |
|  A10(a) [All Academic Performance Reports/Dashboards](#Academicperformance)  | [ ]  | [ ]  |
|  C2(a) [Independent Financial Audit](#Financialaudit) | [ ]   | [ ]   |
|  C2(b) [Quarterly Financial Statement](#Profitandloss)s  | [ ]   | [ ]   |
|  C2(c) [Quarterly Balance Sheet](#Balancesheet) | [ ]   | [ ]   |
|  C2(d) [5-Year Projected Budget](#Budget) | [ ]  | [ ]  |
|  C2(e) [Financial Policies and Procedures](#financialpolicies) | [ ]  | [ ]  |
|  C2(f) [All Financial Performance Reports/Dashboards](#financialperformance) | [ ]  | [ ]  |
|  D7(a) [Current Charter Contract](#currentcontract) | [ ]   | [ ]   |
|  D7(b) [Any Contracts that Describe Preexisting Conditions](#preexistingconditions) | [ ]   | [ ]   |
|  D7(c) [Annual Performance Reports from Current Authorizer](#evaluations) | [ ]   | [ ]   |
|  D7(d) [External](#CSSIsite) Evaluations | [ ]   | [ ]   |
|  D7(e) [Board](#evaluations) Bylaws | [ ]   | [ ]   |
|  D7(f) [Employee Handbook](#evaluations) | [ ]  [ ] N/A | [ ]  [ ] N/A |
|  D7(g) [Student Handbook](#evaluations) | [ ]  [ ] N/A | [ ]  [ ] N/A |
|  D7(h) [Student Discipline Policy](#strategicplan) | [ ]  | [ ]  |
|  D7(i) [School Enrollment](#leadereval) Policy | [ ]  | [ ]  |
|  D7(j) [Strategic Plan](#strategicplan) | [ ]  | [ ]  |
|  D7(k) [School Leader Evaluation and Succession Plan](#leadereval) | [ ]  | [ ]  |
|  D7(l) [Bo](#orgperfomance)ard Self-evaluation | [ ]  | [ ]  |
|  D7(m) [All Organizational Performance Reports/Dashboards](#orgperfomance) | [ ]  | [ ]  |
|  D7(n) [Lease](#agreementsEMP) Agreement | [ ]  [ ] N/A | [ ]  [ ] N/A |
|  D7(o) [Original Charter Application](#evaluations) | [ ]  | [ ]  |
|  D7(p) [Notices of noncompliance](#evaluations) | [ ]  | [ ]  |
|  D7(q) Board Meeting Minutes | [ ]  | [ ]  |
|  D7(r) School Accountability Committee Minutes | [ ]  | [ ]  |
|  E9 [Evidence of Support](#Evidenceofsupport) | [ ]  | [ ]  |
|  Addendum I: [Online School](#_Addendum_II:_) *if applicable* | [ ]  [ ] N/A | [ ]  [ ] N/A |
|  Addendum II: [Innovation School](#_Addendum_III:_) *if applicable* | [ ]  [ ] N/A | [ ]  [ ] N/A |
|  Addendum III: [Education Management Provider](#_Addendum_III:_) *if applicable* | [ ]  [ ] N/A | [ ]  [ ] N/A |
|  Addendum IV: [Alternative Education Campus](#_Addendum_V:_AEC) *if applicable* | [ ]  [ ] N/A | [ ]  [ ] N/A |
| **Added page numbers to the** [**Table of Contents**](#_TABLE_OF_CONTENTS) | [ ]  | [ ]  |
| **Electronic copy of entire application** | [ ]  | [ ]  |

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# Executive Summary

**Please provide narrative that summarizes the elements of the application and provides an overview of the school. The Executive Summary should be three to five pages long and include the following:**

* Overview and rationale for the proposed transfer
* The school’s name, grade levels served, proposed transfer date (month and year), and growth plan (if the school plans to grow enrollment or add additional grade levels)
* Student body to be served, such as key demographic data, targeted geographical area, etc.
* Evidence that an adequate number of stakeholders support the transfer to CSI.
* A brief description of how the school will adjust its organizational capacity to accommodate the transfer.
* A brief description of key financial implications for the organization as a result of the transfer.
* A brief description of the educational program and the school’s past track record of academic performance.

# A. Academic Program

1. **Please provide usernames and passwords to the following:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Data System** | **Username** | **Password** |  |
| Interim Assessment Vendor (ex. MAP, STAR, iReady) |  |  |  |
| Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |  |  |
| Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |  |  |

1. **Complete the Assessment Matrix below, documenting all school-selected and state-required diagnostic, formative, and summative assessments that will be administered at the school.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Assessment Name** | **Content Areas** (ex: Math, Early Literacy) | **Purpose** (Provide a rationale for the selection of this assessment, including alignment with curriculum and instruction.) | **Type** (Diagnostic, Interim, Summative)  | **Frequency** (ex: Annual, 2/year) | **Administration Calendar** (ex: Jan-Feb) |
| W-APT | English  | Identify language proficiency of students with a home language other than English | Diagnostic | Upon enrollment /  | Within 30 days of enrollment /  |
|  |  |  |  |  |  |
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1. **Please use the CSI Baseline Targets Template below to set annual targets on the various state-required assessments and performance measures.**

*For accountability purposes, schools are expected to set their own annual targets for academic achievement, academic growth, academic growth gaps and postsecondary and workforce readiness. Targets for all state-required assessments are required to be included in this form. If you have mission-specific measures that you wish to incorporate within these standard indicators (such as measures of postsecondary readiness above and beyond those evaluated by the State). Be sure to include or attach a definition of each additional measure, as well as the methodology used to evaluate, document and determine metrics for each measure.*

* *For each assessment identified in* ***Assessment Template Matrix*** *above, please include a target in this form.*
* *Under the* ***Measure*** *column, please identify the measure or interim assessment(s) that is being proposed.*
* *Under the* ***Metric*** *column, please identify what you will be measuring (% at/above benchmark, scale score, etc.)*
* *Under the* ***Annual Performance Targets*** *columns, please set a 1-year and 2-year target for each measure. Because the measure and metric have already been defined in other columns, these columns may just have a numeric value (ex: for the Grad Rate target, a 90 in the Year 1 and 95 in the Year 2 targets would mean that the school is targeting 90% and 95% graduation rates in Years 1 and 2, respectively.*
* *In the* ***Interim Measures during Year 1*** *column*, *identify what interim assessment(s) will be used at least quarterly to monitor progress towards reaching the Year 1 target.*
* *In the* ***Progress Monitoring Strategies*** *column, identify any strategies that will be used to help the school meet the target.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Indicators** | **Measure** | **Metric** | **Student Group** | **Annual Performance Targets**  | **Interim Measures during Year 1** | **Progress Monitoring Strategies** |
| Year 1 | Year 2 |
| **Academic Achievement** | CMAS/PARCC English Language Arts | Mean Scale Score | All Students |  |  |  |  |
| English Learners |  |  |  |  |
| Free/Reduced-Price Lunch Eligible |  |  |  |  |
| Minority Students |  |  |  |  |
| Students with Disabilities |  |  |  |  |
| CMAS/PARCC Mathematics | Mean Scale Score | All Students |  |  |  |  |
| English Learners |  |  |  |  |
| Free/Reduced-Price Lunch Eligible |  |  |  |  |
| Minority Students |  |  |  |  |
| Students with Disabilities |  |  |  |  |
| ACCESS for ELL | % of students at benchmark |  |  |  |  |  |
| READ Act (if applicable) | % of students with a Significant Reading Deficiency |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| **Academic Growth** | CMAS/PARCC English Language Arts | Median Student Growth Percentile | All Students |  |  |  |  |
| English Learners |  |  |  |  |
| Free/Reduced-Price Lunch Eligible |  |  |  |  |
| Minority Students |  |  |  |  |
| Students with Disabilities |  |  |  |  |
| CMAS/PARCC Mathematics | Median Student Growth Percentile | All Students |  |  |  |  |
| English Learners |  |  |  |  |
| Free/Reduced-Price Lunch Eligible |  |  |  |  |
| Minority Students |  |  |  |  |
| Students with Disabilities |  |  |  |  |
| ACCESS for ELLs | Median Student Growth Percentile |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| Interim Assessment Measure:  | Interim Assessment Metric:  |  |  |  |  |  |
| **Postsecondary and Workforce Readiness** | PSAT | Composite Mean Score |  |  |  |  |  |
| SAT | Composite Mean Score |  |  |  |  |  |
| Graduation Rate | % of Students Graduating |  |  |  |  |  |
| Dropout Rate | % of Students Dropping Out |  |  |  |  |  |
| Matriculation Rate | % of Students Matriculating |  |  |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Optional Mission-Specific Measures** | Measure 1:  | Metric 1:  |  |  |  |  |
| Measure 2:  | Metric 2:  |  |  |  |  |
| Additional Measure(s):  | Additional Metric(s):  |  |  |  |  |

1. **Describe the prior academic performance and the school’s progress towards meeting its goals. *This response should address:***
* *Prior academic performance on the state assessments as well as any interim assessments*
* *How the school monitored progress towards meeting its goals, including the frequency of data analysis.*
* *A reflection upon the underlying factors that have contributed towards the school’s current progress (both positive and negative) towards meeting their goals.*
* *How authorization with CSI will support the school’s efforts at achieving its goals.*
1. **Please explain how the curriculum was selected, meets the needs of the student population, and is aligned to standards.**
2. **Provide a description of the procedures for taking corrective action if school performance falls below the goals and objectives outlined in the application. Include a corrective action timeline, the responsible person, and possible changes to be considered as appropriate.**
3. **Please describe programmatic and curricular changes anticipated following the change in authorizer.**
4. **Complete the table below to outline the data management system(s) that will be utilized.**
* *In the first column, please identify any other types of data management systems (in addition to a SIS and Plan Management System) that may be used at the school (ex: Learning Management System).*
* *In the* ***System Name*** *column, identify the name of any data management systems that will be used at the school (ex: Infinite Campus).*
* *In the* ***Person Responsible for Data Management*** *column, identify the staff position(s) that will be responsible for the system setup, data entry, and data analysis.*

|  |  |  |
| --- | --- | --- |
|  | **System Name** | **Person Responsible for Data Management** |
| **Student Information System** |  |  |
| **Student Plan Management System (if different than SIS)** |  |  |
| **Other** |  |  |

1. **Please provide a copy of the following documents as attachments:**

|  |  |  |
| --- | --- | --- |
| **Attachment Contents** | **Attachment Title** |  |
| a. | All reports/data dashboards provided to the local board in the last year related to academic performance |  |  |

[Click to go back to the Application Checklist](#_Application_Checklist)

# B. Student Services

**As applicable, please describe any adjustments to the current programming, resource allocation, and staffing that will occur if the proposed school becomes a CSI charter school.**

1. **Include the comprehensive whole school plan for a Multi-Tiered System of Support or child study process that includes a data driven pre-referral prevention-based framework process that meets legal requirements including identification of special needs students.**
2. **Detail plans to support and address student health including the process and procedures for immunizations, record keeping, vision and hearing screenings, health care plans, medication administration, and student illnesses.**
3. **Detail how the school will accommodate different learning styles and the needs of all students. Provide plans and procedures that describe how the school will ensure all students will progress adequately. This should include information related to student identification, programming, assessment, progress monitoring, redesignation/exiting, service model delivery and the continuum of supports the school will have in place to serve students. Please respond to these items for each subgroup identified below (a-e).**
4. **Students with Individualized Education Programs (IEPs)**
5. **Students with Section 504 plans**
6. **Students classified as English Learners**
7. **Students identified as gifted and talented**
8. **Students identified as at-risk**
9. **Detail the proposed staffing structure. Include any changes from the current staffing structure and plans to provide adequate numbers of qualified, in-field staff (including related service providers) to meet the needs of exceptional students in alignment with state requirements. Include information about the proposed contract model to employ staff, any secured agreements or MOUs, and describe the onboarding process for any contract staff.**
10. **Detail how the budget will align with required resources to support special populations. The narrative should address the student plan management system to house student plans, curricula and instructional materials, and necessary staffing and training needed to serve special populations. *The Applicant is required to submit a budget as part of the application submission as detailed in the CSI Budget Template. The description provided below should clearly align to and reference the submitted CSI Budget Template line items.***
11. **Please provide information regarding any Office of Civil Rights (OCR) or state complaints that have found the school to have violated students’ rights or any open OCR or state complaints, if applicable.**

[Click to go back to the Application Checklist](#_Application_Checklist)

# C. Finance

1. **Provide a summary of how the transfer to a CSI charter school will financially impact the school (changes in per pupil revenue, categorical funding, grants etc.) Please include contingency plan to mitigate the impacts of decreased funding or increased expenditures, if applicable.**
2. **Please provide a copy of the most recentversion of the following documents as attachments:**

|  |  |  |
| --- | --- | --- |
| **Attachment Contents** | **Attachment Title** |  |
| a. | Three years of independent financial audits |  |  |
| b. | Quarterly financial statements pursuant to C.R.S. 22-45-102 |  |  |
| c. | Quarterly balance sheet |  |  |
| d. | 5-Year budget detailed by source/object code  |  |  |
| e. | Financial policies and procedures |  |  |
| f. | All reports/data dashboards provided to the local board in the last year related to financial performance |  |  |

1. **For the proposed budget included with the application, please provide:**
	1. **Detailed assumptions for all donations, private grants, student fees, and foundation revenue**
	2. **Detailed assumptions for professional, technical, and consulting services expenditures.**
	3. **Detailed assumptions for liability, property, and other insurance coverage, including coverage and rates.**
	4. **An explanation of how restricted grant funding will be spent.**
2. **Detail financial metrics and targets, including any debt covenants, the board and school leadership will track during the transition to ensure financial solvency as the school changes authorizers.**
3. **Detail how the budget aligns with the proposed execution of the school’s mission and focus including staffing, curriculum, professional development, and technology.**

[Click to go back to the Application Checklist](#_Application_Checklist)

# D. Governance

1. **Complete the Board Membership Matrix**

*Applicants are required to have a governing board in place and to submit the Board Membership Matrix as part of the Transfer Application. Information regarding terms and positions below should align with the board membership information included in your bylaws. Resumes for board members are required to be submitted as described in Section H8.*

* *In the* ***Board Member Name*** *row, please identify all board members by name. If there are any vacant seats, please identify them by typing “Vacant” in the cell. This form has room for 11 board members. Please only use as many cells as you need based on the range for the number of board members identified in your bylaws.*
* *In the* ***Term*** *row, please identify each board member’s term (ex: June 2016-June 2017)*
* *In the* ***Board Position*** *row, please identify each board member’s current role (Chair, Secretary, Treasurer, etc.)*
* *In the* ***Competency*** *column, please list the competencies you are seeking for the school board.*
* *Place an X in the box to identify which competencies each of the board members fill. For any vacant positions, place an X in the box to identify which competencies you are seeking in the vacant position.*

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| **Board Member Name****🡪****Competency ↓**  | *John Doe* |  |  |  |  |  |  |  |  |  |  |
| **Term 🡪** | *08/16-08/20* |  |  |  |  |  |  |  |  |  |  |
| **Board Position 🡪**  | *Chair* |  |  |  |  |  |  |  |  |  |  |
| Finance | *X* |  |  |  |  |  |  |  |  |  |  |
| Legal | *X* |  |  |  |  |  |  |  |  |  |  |
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1. **Provide a description of the governance structure. Delineate the roles and responsibilities of the school board, school administration, and various non-board committees including but not limited to the School Accountability Committee and any advisory groups.**
2. **Provide provide a summary of past and planned board training, capacity building, self-evaluation, and succession planning. Please include a discussion of funding and time allocations for board professional development, as well as evaluation tools.**
3. **Submit most recent strategic plan and detail progress toward meeting the goals and/or objectives identified in the strategic plan.**
4. **Describe any organizational changes related to staffing and leadership anticipated following the transfer and the rationale for the changes.**
5. **Complete the** [**CSI Waiver Request Template**](https://resources.csi.state.co.us/csi-waiver-template-and-sample-waivers/) **if you plan to seek a waiver of rule, law, or policy.**
6. **Please provide a copy of the most recent version of the following documents as attachments.**

|  |  |  |
| --- | --- | --- |
| **Attachment Contents** | **Notes** | **Attachment Title** |
| a. | A copy of the current charter contract |  |   |  |
| b. | A copy of any contracts or instruments that describe preexisting obligations or relationships  | This would include any facilities agreements, contracts with an education service provider, contracts with a back office support provider etc. This does not include contracts for school materials that will not extend beyond the current school year.  |  |  |
| c. | Annual performance reports from the current authorizer for the past five years |  |  |  |
| d. | External evaluations (including CSSI site visit reports) |  |  | [ ] N/A |
| e. | Board bylaws | Should specify board size, length of term, board election process, board roles, frequency of meetings, dismissal policies and procedures for board members, and conflict of interest policy |  |  |
| f. | Employee handbook | Include the relationship between the school and its employees (at-will vs. contract).  |  |  |
| g. | Student handbook |  |  |  |
| h. | Student discipline policy | Include suspension and expulsion policies that align with state law and that address the safety of students and staff, provide a level of due process for students, and explain how the school will provide expelled students with alternative education, if applicable. |  |  |
| i. | Enrollment policy | The policy should be consistent with state law [22-30.5-507(3)] and applicable state board rules, and include a process for enrollment of students with special needs consistent with state and federal laws and state board rules. |  |  |
| j. | Strategic plan |  |  | [ ] N/A |
| k. | School Leader Evaluation Process | Include the process the school will use for school leader evaluation that aligns with the intent of SB 10-191 (including timeline, standards). |  |  |
| l. | Most recent board self-evaluation |  |  |  |
| m. | All reports/data dashboards provided to the local board related to organizational performance |  |  | [ ] N/A |
| n. | Lease agreement |  |  | [ ] N/A |
| o. | A copy of the original charter application |  |  |  |
| p. | Any formal notices of noncompliance or notices of breach of contract received by the school | Schools are only required to include notices received in current school year and the two prior school years.  |  | [ ] N/A |
| q. | Board meeting minutes from the prior school year and the year-to-date (the preceding 18 months) |  |  |  |
| r. | School Accountability Committee meeting minutes for the prior school year and the year-to-date (the preceding 18 months) |  |  |  |

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# E. Operations

1. **Describe any significant operational adjustments that will be required to implement the program after the change in authorizer.**

***Facilities***

1. **Provide a description of the current facility and any anticipated changes to the facility (including any potential or proposed changes to location of the school) that may occur as a result of the transfer of authorization.**

***Safety***

1. **Please submit your current Emergency Response Plan. If there are proposed changes to the school facility, please explain your process to create and maintain the required Emergency Response Plan.**

***Transportation***

1. **Please summarize the extent to which transportation is currently provided at the school.**
2. **Please identify the option below that best describes the school’s intended transportation should the school transfer to CSI. Then respond to all items within the option that you have selected.**

**Option 1: A school may choose to not provide any transportation services.**

1. **Provide a rationale for why the Applicant is not proposing to provide transportation services.**

**Option 2: A school may provide regular transportation services to and from school.**

1. **Include a description of how the charter school plans to meet the transportation needs of students, including at-risk students.**
2. **Provide a description of the daily route that aligns with the transportation plan to meet student needs.**
3. **Provide cost details within the school’s budget and summarize details here.**
4. **Include a plan to address insurance and liability issues pertaining to transportation services using private or school vehicles.**
5. **Include a description of adequate safety measures that will be implemented for the transportation of students.**

**Option 3: A school may provide transportation services for extracurricular activities and events.**

1. **Include a description of how the charter school plans to meet the transportation needs of all students, including at-risk students.**
2. **Provide cost details within the school’s budget and summarize details here.**
3. **Include a plan to address insurance and liability issues pertaining to transportation services using private or school vehicles.**
4. **Include a description of adequate safety measures that will be implemented for the transportation of students.**

***Food Services***

1. **Please summarize the extent to which food services are currently offered at the school.**
2. **Please check which of the following options the school intends to follow should the school transfer to CSI with regards to food services. Respond to all items within the option that you have selected.**

**Option 1: A school may choose not to participate in any federal Child Nutrition Program through a School Food Authority (SFA). Under this option, the school may elect not to operate a lunch program.**

* 1. **Provide a rationale for why the Applicant is not proposing to provide food services.**

**Option 2: A school may choose not to participate in any federal Child Nutrition Program through a School Food Authority (SFA). Under this option, the school may choose to operate their own meal service(s) that are unsubsidized by federal funds.**

* 1. **Provide a rationale for why the Applicant is proposing to operate its own meal service(s) unsubsidized by federal funds.**
	2. **Include details about how the food service will be provided.**
	3. **Address how the school will provide services to students who forget or cannot provide a lunch.**

**Option 3: A school may choose to participate in federal Child Nutrition Programs and receive federal reimbursement funds. Within this option, a school may elect to contract with a School Food Authority.**

1. **Provide rationale for why the Applicant is selecting this food service option.**
2. **Include details about how the food service will be provided.**
3. **Provide evidence of a plan for reimbursement through an authorized School Food Authority.**
4. **Address how the school will provide services to students who forget or cannot provide a lunch.**

**Option 4: A school may choose to participate in federal Child Nutrition Programs and receive federal reimbursement funds. Within this option, a school may obtain state designation as a School Food Authority.**

1. **Provide rationale for why the Applicant is selecting this food service option.**
2. **Include details about how the food service will be provided.**
3. **Provide evidence of a plan for reimbursement through an authorized School Food Authority.**
4. **Address how the school will provide services to students who forget or cannot provide a lunch.**

# F. Evidence of Need, Support

1. **Please identify the projected number of students that will be enrolled at each grade level for each of the first five years of operation following the transfer.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| **PreK** |  |  |  |  |  |
| **K** |  |  |  |  |  |
| **1** |  |  |  |  |  |
| **2** |  |  |  |  |  |
| **3** |  |  |  |  |  |
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| **10** |  |  |  |  |  |
| **11** |  |  |  |  |  |
| **12** |  |  |  |  |  |
| **Total** |  |  |  |  |  |

***If applicable, please describe whether any of the above Year 1 enrollment numbers vary significantly from your existing student population or if additional grades will be served.***

1. **Please identify what percentage of each student population is currently served by your school.**

*For schools that anticipate demographics changing from following the transfer, please fill out the* ***Projection*** *row. If you anticipate demographic projections remaining the same, please only fill out one row.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Year** | **% Minority** | **% Free/Reduced Lunch Eligible** | **% Special Education** | **% English Learner** | **% Gifted/ Talented** |
| **Current Year** |  |  |  |  |  |
| **Projection (if applicable)** |  |  |  |  |  |

***If applicable, please explain why any of the above percentages vary significantly from your existing student population.***

1. **Describe the degree to which the school has engaged existing parents and community members regarding the proposed change in authorizer.**
2. **Describe expectations and plans for ongoing parent and community involvement from the time of application through transfer.**
3. **Please provide evidence that an adequate number of parents, teachers, or pupils support transfer to the Institute. The following may satisfy this requirement and be submitted as attachments:**

|  |  |  |
| --- | --- | --- |
| **Attachment Contents** | **Attachment Title** |  |
| a. | Results from a survey disseminated to all stakeholder groups, including the number and proportion of respondents from each group |  | [ ] N/A |
| b. | Letters of support from identified stakeholder groups |  | [ ] N/A |
| c. | Letters of intent to remain enrolled or enroll in the program following the transfer |  | [ ] N/A |

1. **In the table below, please list out all existing community partnerships and networking relationships.**

|  |  |
| --- | --- |
| **Entity** | **Nature of Partnership / Description** |
|  |  |
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# Required Addenda *as Applicable*

## Addendum I: Online School

*The online school addendum should be completed if the school is proposing to be an online school as defined on the CDE website.*

**If the school intends to be a multi-district online school, the Applicant should submit its Plan for Operating an Online School, which begins on page 21 of the** [**CDE Multi-District Online School Application**](https://www.cde.state.co.us/sites/default/files/docs/onlinelearning/Certification_Application_1617.pdf)**, as an addendum to the application.**

**[ ] This school is proposing to be an online school. This addendum is included in the application packet.**

**[ ] Not Applicable**

## Addendum II: Innovation School

*The innovation addendum should be completed it the application proposes a school model/program with strong potential to accelerate student success through dramatically different school designs, instructional strategies, uses of technology, staffing models, governance arrangements, family and community engagement strategies, and other approaches.*

**If the school intends to propose an innovative educational model/program, the following items should be addressed within the body of the Transfer Application Narrative and summarized in an addendum to the application.**

1. An applicant may propose a model centered on innovation in curriculum, instructional strategies, assessment, governance, family and community engagement strategies, or other areas, or in a combination of two or more areas. Please explain how the proposed model is fundamentally different from typical school models. This should include an explanation of the innovation and the rationale for the chosen innovation, including a detailed, thoughtful and appropriate use/integration of the innovation into the school model/program, and an explanation of how that innovation will improve student outcomes.
2. Please describe and explain any available evidentiary basis for the efficacy of the model or for the ideas underlying the model.
3. Please include an explanation of how the proposed model will be monitored and evaluated and held to the same high accountability standards to which CSI holds all schools.
4. Please include any proposed mission-specific measures that would allow the school to demonstrate the efficacy of the proposed innovations. Use the mission-specific measures template to detail the anticipated design of the measures.
5. Please include any specific staffing structures and/or professional development/training that are unique to the proposed innovations.

**[ ] This school is proposing to be an innovation school. This addendum is included in the application packet.**

**[ ] Not Applicable**

## Addendum III: Education Management Provider, Collaborative, Incubator

*An Education Management Provider is defined in Colorado law as a nonprofit, not-for-profit, or for-profit entity that contracts with a charter school to provide, manage, or oversee all, or substantially all, of the education services provided by the charter school. An Education Management Provider is different from a Charter School Collaborative or an Incubator. A Charter School Collaborative is defined by law as two or more charter schools contracting with one another to form a legal entity separate from the contracting charter schools and is authorized to provide any function, service, or facility that is lawfully authorized for each of the contracting charter schools. An Incubator is defined as any organization contracted to support the development of the charter school including but not limited to application development, professional development, human resource, and other services in the early years of the school’s operation.*

**If the school intends to contract with an education management provider, incubator, or collaborative, the following items should be addressed and included as an attachment. “Provider” below should refer to whichever contractors (EMP, incubator, or collaborative) you are proposing to contract with. This addendum should not exceed 15 pages.**

1. Provide the rationale for selection of the provider.
2. Provide evidence that demonstrates the effectiveness of the provider with other schools, including particularly schools in Colorado and schools serving a similar population. This should include performance data around academic, financial, and operational success.
3. Provide evidence demonstrating the capacity of the provider for successful expansion while maintaining quality in the school(s) it is currently managing.
4. Include an explanation of any existing or potential conflicts of interest between the governing board of the proposed charter school and the provider.
5. Provide evidence that the provider is authorized to conduct business in Colorado.
6. Include a detailed description of cost sharing, fee structures, and central versus school level functions.
7. Provide a clear understanding of financial obligation to the provider. This should include considerations of changes in costs (increases, decreases, etc.) throughout the duration of the charter term. This should also include building ownership if the developers are making payments to the provider.
8. Include a copy of the actual or proposed performance contract between the governing board for the proposed charter school and the provider that specifies, at a minimum, the following material terms:
	1. Performance evaluation measures
	2. Methods of contract oversight and enforcement that the governing board will use
	3. Delineation of central (provider) vs. school level functions
	4. Conditions for contract renewal and termination
	5. Information around which staff will be hired and terminated by the provider, report to the provider, or will be paid by the provider
	6. The compensation structure and all fees that the proposed charter school will pay to the provider
9. Include copies of the last three years of audited annual financial statements (balance sheets and profit and loss statements), copies of any current or past liens, and copies of and pending or past lawsuits.

**[ ] This school is proposing to contract with a provider. This addendum is included in the application packet.**

**[ ] Not Applicable**

## Addendum IV: AEC

**If the Applicant intends to apply for designation as an Alternative Education Campus (AEC), the following information must be included in the narrative of the application and summarized as an addendum to the application.**

*Colorado law allows each school, with its authorizer’s approval, to request designation as an Alternative Education Campus (AEC). Alternative Education Campuses (AECs) are defined as schools that have a specialized mission and serve either a special-needs and/or at-risk population, where more than 90% of students have either an Individualized Education Program or meet the definition of a high-risk student. The specific eligibility are listed in 1 CCR 301- 57-2207602-R-3.00. To receive this designation, schools must demonstrate that it meets the eligibility criteria annually.*

1. **Identify the particular high-risk student populations your school will be focused on serving. (A list of the high-risk student populations can be found on the Summary tab of the CDE AEC Application.)**
2. **Be sure your application specifically addresses how your outreach will reach the high-risk student populations required for AEC designation.**
3. **Address how the proposed model will include at least two of the three required elements: a high-quality college and career-ready instruction, programs to build college and career-ready skills, and appropriate supports for students in the first year of postsecondary enrollment. Additionally, please describe how the required elements align to the proposed graduation policy.**
4. **Complete AEC Target Setting Form**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Performance Indicators | Measures/ Metrics | Annual Performance Targets | Interim Measures for 2018-2019 | Progress Monitoring Strategies |
| 2018-2019 | 2019-2020 |
| Student Engagement | Attendance Rate |  |  |  |  |
| Truancy Rate |  |  |  |  |
| Supplemental Measure(s)  |  |  |  |  |
| Postsecondary & Workforce Readiness | Completion Rate |  |  |  |  |
| Dropout Rate |  |  |  |  |
| Mean CO ACT |  |  |  |  |
| Supplemental Measure(s)  |  |  |  |  |

**[ ] This school is proposing to be an AEC. This addendum is included in the application packet.**

**[ ] Not Applicable**