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|  | **Guidelines for Charter Amendments to Districts Served, Grades Served, and Maximum Enrollment** |
|  |
| May 2023 |



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# Introduction

These guidelines have three purposes:

* To identify the kinds of changes[[1]](#footnote-2) that must be approved by the Board of Elementary and Secondary Education (Board) prior to implementation;
* To outline the process that a charter school must follow when requesting approval of an expansion amendment; and
* To specify the information that must be included in an expansion amendment request.

# Changes at a Charter School Which Require Approval of the Board of Elementary and Secondary Education

Changes requiring approval by the **Board** before they can be implemented include:

* [Maximum enrollment;](#_Maximum_Enrollment_and/or)
* [Grades served;](#_Instructions_for_Amendment)
* [District(s) specified in a school’s charter;](#_Mission_or_Educational) and
* Contractual relationship with an education management organization that is providing or planning to provide substantially all the school’s educational services.[[2]](#footnote-3) (603 CMR 1.10(1)).

The charter school's board of trustees must vote on adopting the proposed change to its charter and submit an amendment request that addresses the requirements described in these guidelines. In general, the Board will consider requests for maximum enrollment increases, changes to grades served, and districts specified in the school’s charter only **after** the school undergoes a comprehensive evaluation by the Department at the time of the school’s first charter renewal. Additionally, any school under one or more conditions is unlikely to be considered by the Board until the school has made progress towards meeting the conditions and the commissioner has recommended removal of conditions. Schools are encouraged to consult with the Department **prior** to submission to ensure the request meets the standards for consideration by the commissioner and the Board. The annual deadline for all types of expansion requests can be found at: <http://www.doe.mass.edu/charter/governance/?section=requests>.

***A Note about Consolidations:*** A consolidation is an action by the Board to permit two or more legally distinct charter schools within a charter school network[[3]](#footnote-4) to operate as a single charter school with multiple campuses. The Board has previously granted consolidation amendments to six networks of charter schools. Please contact the Department for further guidance if considering a request for consolidation.

## **Review of Amendment Requests Subject to Board Approval**

The Department manages the process of review for the commissioner and the Board. Submission of an accurate amendment request that includes all of the required elements as described in these guidelines increases the efficiency with which the request can be processed.

Pursuant to 603 CMR 1.10, the commissioner and the Board consider the school’s record of performance when reaching a determination regarding a school’s request to amend its charter. In general, the following factors are considered during the review of charter amendment requests:

* the school’s compliance with applicable state, federal, and local law;
* affirmative, credible evidence of the existing school's success in each of the three accountability areas as documented in the [Charter School Performance Criteria (CSPC](http://www.doe.mass.edu/charter/acct.html?section=criteria)): academic program success, organizational viability, and faithfulness to the terms of its charter. Examples of evidence include accountability documentation such as summaries of review and site visit reports.

The commissioner reviews all requests **prior** to asking the Board for approval. If the commissioner does not recommend a charter school’s amendment request and does not bring the request to the Board for consideration, the school’s board of trustees may request that the Board review the commissioner’s decision at the time of the commissioner’s decision (603 CMR 1.10(8)). The school’s board of trustees may not request review of the commissioner’s decision **beyond** the fiscal year of the original submission.

## **Differentiation Based on Type of Amendment**

The Department’s requirements for requests to amend a school’s **charter region**, **maximum enrollment**, and **grades served** are **differentiated** based upon the type of proposed change. Please follow the instructions that align with all areas of your request. In rare instances, a school may seek to remove districts from the charter region, decrease maximum enrollment, or eliminate grades. Please consult with the Department in these circumstances to ensure your request adequately addresses the unique parameters of these requests.

The Department may conduct interviews or request supplemental information to address any areas of concern identified through the review process that require additional information or context from the school, including eligibility for proven provider status if required.

## **Review of School Performance**

Once a request for expansion is submitted, the Department will compile and review the school’s available data by all students and student groups[[4]](#footnote-5) for enrollment, academic performance on the MCAS test, and school indicators such as student discipline and attrition, as well as the school’s financial health and management. The Department will also review recent school accountability documents, such as annual reports, renewal documents, site visit reports, and audits.

The Department may discuss with the school any specific concerns identified in overall performance or disparities amongst student groups within the student population that are not already identified and addressed by the school in its submitted amendment request. If the Department identifies any new concerns related to school performance, the school and board leadership will have an opportunity to provide supplemental information related to the performance concerns.

Supplemental information may include but is not limited to:

1. student recruitment and enrollment practices;
2. student retention practices;
3. student support systems for academic and non-academic needs;
4. special education programming;
5. English language education programming;
6. educational program evaluations, including the use of disaggregated data;
7. student discipline systems;
8. parent/guardian engagement;
9. staff recruitment, development, evaluation, and retention practices;
10. strategic planning and oversight practices by board and school leadership;
11. board and school leadership evaluations;
12. trustee recruitment, training, and succession practices;
13. financial management and resources;
14. real estate and facility needs and management;
15. student transportation (for regional Commonwealth charter schools); and
16. compliance with federal and state laws and regulations.

The Department expects schools to review these aspects of school programming and performance during the development and crafting of the expansion request. The Department strongly encourages schools to proactively address any potential concerns within the narrative of the request to support the Department’s review of your submission.

## **Proven Provider Requirement**

Any Commonwealth charter school located in or serving as part of its region a district performing in the lowest 10 percent statewide **should contact the Department to confirm if the group must qualify as a proven provider**. Proven provider status is required when requesting to *increase* *the maximum enrollment* of an existing Commonwealth charter school **if** the sending region includes district(s) that have performed in the lowest 10 percent statewide **and** where the 9 percent net school spending cap *has been or would be exceeded* by the request or the combination of amendment requests and new charter applications submitted. The commissioner will evaluate whether a board of trustees qualifies as a proven provider based on the performance of the existing school compared to the state and the district in which the school is located.

In order to determine if a current board of trustees qualifies for proven provider status, the commissioner will consider affirmative, credible evidence of the existing school's success in each of the three accountability areas as documented in the [Charter School Performance Criteria (CSPC)](http://www.doe.mass.edu/charter/acct.html?section=criteria): academic program success, organizational viability, and faithfulness to the terms of its charter. Pursuant to [603 CMR 1.04(4)](http://www.doe.mass.edu/lawsregs/603cmr1.html?section=04), determination of proven provider status includes consideration of the following data as indicators of success in student academic performance and evidence of overall academic program success:

* Levels of student achievement and growth on the MCAS tests in English language arts and mathematics, for over no less than a three-year period, for all students and one or more student groups; and
* attendance, retention, attrition, in-school suspension rates, out-of-school suspension rates, and if applicable, emergency removal, graduation, and dropout data.

**Proven provider status is determined at the time of the request.** Earlier determinations of proven provider status made for previous amendment requests or charter applications are not maintained for requests in future years. The Department **will not require** submission of any data readily available on the Department’s website.

The Department strongly encourages schools to submit student performance data for other standardized assessments in English language arts and mathematics as evidence of academic student achievement, particularly for school years where MCAS testing data is unavailable for review or impacted by the COVID pandemic. Please note that any additional student performance data that is provided must also include a “statewide average” of the standardized assessment. If a statewide average is not available, the additional student performance data may not be used to make a Proven Provider determination.

Please consult with the Department regarding the submission of aggregated performance data from alternative assessments for the purposes of the proven provider requirement.

## Charter School Program Grant

Massachusetts was awarded the [federal Charter Schools Program (CSP) grant](https://oese.ed.gov/offices/office-of-discretionary-grants-support-services/charter-school-programs/state-entities/) for fiscal years   
2023-2027. Funds are available for award to existing charter schools granted significant expansions. The Department will discuss CSP grant funding with applicants.

Expanding charter schools receive $2,000 per additional pupil served for any increase in enrollment, but no more than $1,000,000 in total. Up to $300,000 in additional funds are available, contingent on meeting three design priorities. The design priorities include equitable access to high quality public education by serving a population of student groups comparable to, or greater than, the school’s sending districts in year one and two of implementation, and establishing high school and post-secondary success through an educational program that incorporates evidence-based strategies to improve outcomes for secondary students.

Schools who submit requests that are eligible to receive CSP grant funding may be subject to an interview after an initial review of the school’s performance in the three areas of charter accountability.

# Preparing and Submitting Amendment Requests

**All documentation must be submitted to the Department electronically, including documents with signatures.** Amendment requests are addressed to the Board. All amendment requests are submitted under the penalties of perjury and must provide **complete information** regarding the request. Incomplete amendment requests will not be considered and will require resubmission which will delay the review process.

All amendment requests shall include a **Charter Amendment Cover Sheet** and a **Charter Amendment Request Letter**. Charter Amendment Request Letters to the [Board](http://www.doe.mass.edu/charter/governance/?section=requests) should align with instructions within these guidelines and the template letter provided online. All request letters should describe how the school’s board of trustees came to decide to submit the charter amendment, why the amendment should be granted, and indicate specific concerns if the request is not granted, as applicable. Templates of the Cover Letter and Request Letter can be found at: <http://www.doe.mass.edu/charter/governance/>.

All amendment requests are submitted via email to [**CharterSchoolAmendments@mass.gov**](mailto:CharterSchoolAmendments@mass.gov). For all amendment requests with a published annual deadline, the full request **must be submitted by 12 noon**, to be considered.

**Schools are required to submit the amendment request as a Microsoft Word document. Only letters signed by individuals authorized by the board of trustees to submit the request may be submitted in Portable Document Format (PDF).** The Department may alter the submission to create a document that is accessible to all, including individuals utilizing assistive technology to access information. The Department’s Website Accessibility Policy and guidance on preparing accessible documents can be found at <http://www.doe.mass.edu/nmg/accessibility.html>.

***A Note about Superintendent Amendment Receipt***: If a Commonwealth charter school seeks an amendment to change its maximum enrollment, grades served, or the districts specified in its region, the school is **required** to send a copy of its amendment materials to the superintendent of the school districts from which the school enrolls or is expected to enroll students and certify to the Department that it has done so. Certification may include evidence of email or hard copy distribution; a written assurance will not be sufficient. The Department will solicit and review comments on the amendment request from the superintendents of the affected districts.

While the Department solicits and reviews comments from superintendents on amendment requests to change maximum enrollment, grades served, or the districts specified in its region, **charter schools are encouraged to inform families and community members of their ability to provide public comment to the Department’s Office of Charter Schools and School Redesign at** [**charterschools@doe.mass.edu**](mailto:charterschools@doe.mass.edu) **for commissioner and Board consideration.**

# Instructions for Amendment to District(s) Specified in a Charter School’s Region

Any Commonwealth charter school which wishes to add one or more districts to its current charter region must request approval from the Board. Please contact the Department with any questions regarding your request, including seat availability or the proven provider requirements for [districts performing in the lowest 10 percent](http://www.doe.mass.edu/charter/enrollment/CapIncrease/). If the school’s request to add a district(s) includes an increase in enrollment and/or changes to the grades served, please consult with the Department to ensure that you have correctly identified the relevant criteria in subsequent sections. If the request to amend a school’s charter region is required by M.G.L. c. 71 § 89(n) due to enrollment outside of its approved charter region, please also follow the instructions below.[[5]](#footnote-6)

In rare instances, a school may seek to **remove districts from the charter region**. Please consult with the Department in these circumstances to ensure your request addresses the unique parameters of this type of request.

The request must include the following components, as applicable.

* Charter Amendment Request Cover Sheet

Template: <https://www.doe.mass.edu/charter/governance/?section=requests>

* Charter Amendment Request Letter

Template: <https://www.doe.mass.edu/charter/governance/?section=requests>

* Charter Amendment Request (Response to Criteria)

Submission must contain complete responses to the criteria.

* Certification that the local school committee have approved the proposed changes (Horace Mann charter schools only)
* Certification that the teachers’ union has approved the proposed changes (only Horace Mann I and III) or certification that the majority of the school’s faculty has approved the proposed changes (only Horace Mann II)
* Send a copy of the submitted amendment materials to the superintendent of the school districts from which the school enrolls or is expected to enroll students and certify to the Department that it has done so. Certification may come in a variety of forms, such as email, or proof of mailing via certified mail.

Please address the following sixteen criteria in your request, as applicable. Submission **should not exceed eight pages**, not including the draft enrollment policy and application for admission.

1. Describe how the charter school has determined a need to change the charter region, including how the board of trustees determined the need for the charter amendment, why the amendment should be granted by the Board, and specific concerns if the request is not granted.
2. Describe the reason for the selection of the community(ies) and the relationships that have been established in the targeted community by the school.
3. Describe the input provided by the school community and community members in the school’s proposed amendment, including families interested in enrolling their child(ren). Include a detailed explanation of how community input was collected and incorporated into the request.
4. Provide examples of how the school will or has involved parents/guardians as active partners in the education of their children and will build and maintain family-school partnerships that support students’ academic progress and social-emotional well-being. Include an explanation of how the school will or has engaged stakeholders, including new and current families, educators and staff, and community members in decision-making for the school.
5. Describe the enrollment trends experienced by the school that may require this charter amendment request. If charter enrollment within the present charter region has declined over time while enrollment outside of the charter region has increased, provide a rationale for the enrollment trends experienced by the school and the strategies the board and school leadership have implemented in response prior to the current request.
6. Describe how this amendment enhances or expands the educational opportunities currently available to families and how the proposed change will provide benefits to the community(ies).
7. Describe how families and the community have been engaged or will be engaged to ensure an instructional model that best serves students and their families, including students with disabilities and English learners.
8. Describe how the school has assessed parental support and interest from the proposed district(s) to be added to the school’s region and provide evidence of demand. The Department strongly discourages the submission of petitions containing confidential personal information as evidence of demand.
9. Provide examples of anticipated additional strategies to attract, enroll, and retain students that will be incorporated in the school’s recruitment and retention plan if changes to the charter region are granted, as applicable.
10. Explain trends and/or anomalies in attendance, chronic absenteeism, retention, stability, churn, attrition, in-school suspension rates, out-of-school suspension rates, and if applicable, emergency removal, graduation, and dropout data over the past five years. The Department performs a review using available student data in the aggregate, and by certain student groups, and grade cohorts using the [CHART tool](https://www.doe.mass.edu/charter/finance/chart/) at <https://www.doe.mass.edu/charter/finance/chart/>. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance.
11. The Department will conduct a review of the school’s academic performance on the [MCAS English language arts, mathematics, and science and technology/engineering tests](https://profiles.doe.mass.edu/statereport/nextgenmcas.aspx) for the most recent years available. School should explain trends and/or anomalies in past performance. Additionally, schools may submit student performance data for other standardized assessments in English language arts, mathematics, and science and technology/engineering as additional evidence of academic student achievement. Please indicate and define the metric used in your submission. Schools are required to submit at least three years of data for all students and one or more student groups.[[6]](#footnote-7)
12. Provide a projection of how the expansion of the region will impact enrollment distribution across the grade span from the proposed district(s) and existing districts in the region. Explain the basis for your projection. Please factor into your projection the current availability of seats under the applicable net school spending cap (see *District Information on Enrollment Projections* at <http://www.doe.mass.edu/charter/governance/>).
13. Identify if the current grade span includes a preschool grade that is not available in all districts of the proposed region. Describe how the school intends to manage the enrollment of preschool students for whom the school will not receive tuition reimbursement.[[7]](#footnote-8)
14. Describe how transportation services will be provided to all eligible students.[[8]](#footnote-9) Indicate if transportation services will be modified from current practice if the request is granted. No later than February 1st, charter schools must notify the school district of all transportation needs for the following school year, including any changes resulting from the granting of an amendment, if the school district provides transportation for students who reside where the school is located. NOTE: A school’s commitment to provide transportation services to residents of the charter region during the scheduled school year, including those students who reside outside the city or town where the school is located, will establish the school’s eligibility for regional transportation aid.
15. Describe the anticipated financial impact if the amendment is granted and the school’s preparations for any challenges, e.g., revenue increase or decrease based on variation in per pupil tuition and projected enrollment, additional transportation costs due to larger geographical region, etc.
16. Submit a draft enrollment policy and application for admission that reflects the proposed charter region and enrollment preference change. [*If the Board of Elementary and Secondary Education approves the school’s request, the Department will work directly with the school to provide provisional approval of a revised enrollment policy and application for admission and ensure timely approval by the commissioner prior to the next enrollment period.]*

# Instructions for Amendment to Grades Served

Any Commonwealth or Horace Mann charter school seeking to change its grades served must request approval from the Board. All requests must explicitly indicate within the request the proposed change to grades served in addition to providing information as described in these guidelines. All schools who seek to amend their charter through an expansion must submit a detailed request that addresses the associated criteria by the published annual deadline. **Note that the following criteria are** **tailored for schools seeking to change grade served without any increases to its maximum enrollment**. Please see Amendment Guidelines [Section VI](#_Instructions_for_Major_3) if you seek to change your school’s grades served *and* increase its maximum enrollment. The Department requires any re-submission of a previously unsuccessful request for expansion to respond to the deficiencies of the prior request as identified by the commissioner or the Board.

***A Note about Expansions and Student Entry Points:*** As part of all amendment requests involving expansions, the Department evaluates and considers the degree to which schools provide admission for new students across all grade levels. To strengthen a request for expansion, the Department strongly encourages schools to increase access and admission of new students at as many grade levels as possible. In approving recent amendment requests, the Board has indicated its support for the growth of charter schools that provide student access beyond what is required in statute.

In rare instances, a school may seek to **eliminate grades**. Please consult with the Department in these circumstances to ensure your request adequately addresses the unique parameters of this type of request.

The request must include the following components, as applicable.

* Charter Amendment Request Cover Sheet

Template: <https://www.doe.mass.edu/charter/governance/?section=requests>

* Charter Amendment Request Letter

Template: <https://www.doe.mass.edu/charter/governance/?section=requests>

* Charter Amendment Request (Response to Criteria)

Submission must contain complete responses to the criteria.

* Send a copy of the submitted amendment materials to the superintendent of the school districts from which the school enrolls or is expected to enroll students and certify to the Department that it has done so. Certification may come in a variety of forms, such as email, or proof of mailing via certified mail.
* Certification that the local school committee have approved the proposed changes (Horace Mann charter schools only)
* Certification that the teachers’ union has approved the proposed changes (only Horace Mann I and III) or certification that the majority of the school’s faculty has approved the proposed changes (only Horace Mann II)

## Criteria for Adding One Grade

Please address the following fourteen criteria in your school’s submission. The submission **should not exceed eight pages**.

1. Describe how the charter school has determined a need to change the grades served, including how the board of trustees determined the need for the charter amendment, why the amendment should be granted by the Board, and specific concerns if the request is not granted.
2. Describe the input provided by the school community and community members in the school’s proposed amendment, including families interested in enrolling their child(ren). Include a detailed explanation of how community input was collected and incorporated into the request.
3. Describe how the school has determined that there is sufficient parent support and interest to fill seats within the proposed grade at the school under the proposed amendment, including support from families of prospective students as well as current students.
4. Describe how a change in grade span enhances or expands the educational opportunities currently available for families and how the proposed change will provide benefits to the community. Incorporate a discussion regarding the key design elements of your school into your response
5. Describe how the proposed change to grades served will impact any key design elements of the current educational program or curriculum model. Provide examples of how the key design elements of the current school model will be reflected in the additional proposed grade.
6. Describe how families and the community have been engaged or will be engaged to ensure an instructional model that best serves students and their families, including students with disabilities and English learners.
7. Provide examples of how the school will or has involved parents/guardians as active partners in the education of their children and will build and maintain family-school partnerships that support students’ academic progress and social-emotional well-being. Include an explanation of how the school will or has engaged stakeholders, including new and current families, educators and staff, and community members in decision-making for the school.
8. Indicate, in a table, both the historical distribution of enrolled students in the present grade span, and the projected distribution of students by the proposed grade span, including the primary entry points for new students and the grades where backfilling will occur. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. The table should reflect the implementation timeline, projecting a five-year enrollment pattern, or more if necessary, to project the full grade span requested without changing overall maximum enrollment. In your projection, clearly indicate the potential for variation in enrollment to safeguard against the need for a future minor amendment if granted. In addition to the table, please describe any changes to your current enrollment process that may occur if the amendment is granted. If your proposal to add a grade includes any increase to enrollment, please refer to section VI for the required criteria.
9. Explain trends and/or anomalies in attendance, chronic absenteeism, retention, stability, churn, attrition, in-school suspension rates, out-of-school suspension rates, and if applicable, emergency removal, graduation, and dropout data over the past five years. The Department performs a review using available student data in the aggregate, and by certain student groups, and grade cohorts using the [CHART tool](https://www.doe.mass.edu/charter/finance/chart/) at <https://www.doe.mass.edu/charter/finance/chart/>. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance.
10. The Department will conduct a review of the school’s academic performance on the [MCAS English language arts, mathematics, and science and technology/engineering tests](https://profiles.doe.mass.edu/statereport/nextgenmcas.aspx) for the most recent years available. School should explain trends and/or anomalies in past performance. Additionally, schools may submit student performance data for other standardized assessments in English language arts, mathematics, and science and technology/engineering as additional evidence of academic student achievement. Please indicate and define the metric used in your submission. Schools are required to submit at least three years of data for all students and one or more student groups.[[9]](#footnote-10)
11. Provide a complete staffing chart that assumes full implementation of the requested amendment. Provide a detailed narrative that explains the proposed staffing changes and describes how these changes support the planning and implementation of the amendment. Requests that do not include a staffing chart or narrative will be considered incomplete.
12. Describe the facility that will be used to meet the school’s needs and how it is accessible to individuals with physical disabilities and able to accommodate all students, and if modifications will be required. Indicate if the current facility will accommodate the expansion, or if additional space and/or renovations will be required.
13. If a regional charter school, provide a projection of how the change in grades served will impact enrollment distribution from your sending districts or region. Explain the basis for your projection. Please factor into your projection the current availability of seats under the applicable net school spending cap (see *District Information on Enrollment Projections* at <http://www.doe.mass.edu/charter/governance/>).
14. Submit a draft enrollment policy and application for admission which reflects the proposed change to entry point(s) and backfilling of vacancies, as applicable. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. [*If the school’s request is approved by the Board of Elementary and Secondary Education, the Department will work directly with the school to provide provisional approval of a revised enrollment policy and application for admission and ensure timely approval by the commissioner prior to the next enrollment period.]*

## Criteria for Adding Two or More Grades

Please address the following twenty-eight criteria in your school’s submission.

Rationale for Expansion

1. Describe how the charter school has determined a need to change the grades served, including how the board of trustees determined the need for the charter amendment, why the amendment should be granted by the Board, and specific concerns if the request is not granted.
2. Describe the input provided by the school community and community members in the school’s proposed amendment, including families interested in enrolling their child(ren). Include a detailed explanation of how community input was collected and incorporated into the request.
3. Describe how the school has determined that there is sufficient parent support and interest to fill seats in the proposed grades at the school under the proposed amendment, including support from families of prospective students as well as current students.

Planning for Enrollment

1. Indicate, in a table, both the historical distribution of enrolled students in the present grade span, and the projected distribution of students by the proposed grade span, including the primary entry points for new students and the grades where backfilling will occur. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. The table should reflect the implementation timeline, projecting a five-year enrollment pattern, or more if necessary, to project the full grade span requested. In your projection, clearly indicate the potential for variation in enrollment to safeguard against the need for a future minor amendment if granted. In addition to the table, please briefly describe current enrollment and backfilling processes, including how grade-level enrollment is determined and how and when vacancies are filled if students withdraw. Please describe any changes that may occur if the amendment is granted.
2. If a regional charter school, provide a projection of how the change in grades served will impact enrollment distribution from your sending districts or region. Explain the basis for your projection. Please factor into your projection the current availability of seats under the applicable net school spending cap (see *District Information on Enrollment Projections* at <http://www.doe.mass.edu/charter/governance/>).
3. Submit a draft enrollment policy and application for admission which reflects the proposed change to entry point(s) and backfilling of vacancies, as applicable. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. [*If the school’s request is approved by the Board of Elementary and Secondary Education, the Department will work directly with the school to provide provisional approval of a revised enrollment policy and application for admission and ensure timely approval by the commissioner prior to the next enrollment period.]*

Educational Program

1. Describe how a change in grade span enhances or expands the educational opportunities available for families and how the proposed change will provide benefits to the community. Incorporate a discussion regarding the key design elements of your school into your response.
2. Describe how the proposed change to grades served will impact any key design elements of the current educational program or curriculum model. Provide examples of how the key design elements of the current school model will be reflected in the additional proposed grades.
3. Describe how families and the community have been engaged or will be engaged to ensure an instructional model that best serves students and their families, including students with disabilities and English learners.
4. Provide examples of how the school will or has involved parents/guardians as active partners in the education of their children and will build and maintain family-school partnerships that support students’ academic progress and social-emotional well-being. Include an explanation of how the school will or has engaged stakeholders, including new and current families, educators and staff, and community members in decision-making for the school.
5. Describe any schedule changes anticipated with implementation of the new grade span, including length of school year, week, or day. Describe how the change in grade span will impact the mechanics of the educational program in terms of the daily and weekly organization of students and faculty.
6. Provide an overview of how the current educational program, curriculum model, or whole school design, including curriculum and instruction, will be adapted to serve younger or older students, as applicable.
7. Describe the processes used for ensuring that the school’s curriculum is aligned to Massachusetts curriculum frameworks, aligned vertically between grades, and aligned horizontally across classrooms at the same grade level.
8. Describe a timeline for curriculum development and implementation, if applicable, including the individuals involved.
9. Describe the process and procedures used to evaluate whether curriculum and instruction is effective and successfully implemented. Include in your response a brief summary of the assessment system implemented at the school, and any modifications if request is granted.
10. If the request would create a grade grouping not currently served by the school, e.g., elementary school, middle school, high school, provide descriptions of the courses in the new grade groupings, including the content and skills to be taught in the core content areas.

Capacity

1. Describe how the staff will implement the request effectively and evaluate its success. Indicate the individuals involved throughout the process of implementation, and the systems in place for decision-making and communication among all members of the school community.
2. Provide a complete staffing chart that assumes full implementation of the requested amendment. Provide a detailed narrative that explains the proposed staffing changes and describes how these changes support the planning and implementation of the amendment. Requests that do not include a staffing chart or narrative will be considered incomplete.
3. If the school contracts with an education management organization (EMO), describe how the EMO will support the planning and implementation of the proposed amendment.
4. Provide an action plan for implementation. Describe the proposed strategies that will lead to a successful implementation of the proposed changes. Include: a timeline, action(s) to be taken, designated point person, and start date and projected completion date.

Governance

1. Describe how the board of trustees will implement the request effectively and evaluate its success. Provide details of the board’s role in planning, and monitoring progress of the expansion.
2. Provide copies of the materials used by the board to arrive at its decision to pursue the proposed amendment, include agendas and approved board minutes (including all relevant board committee minutes) as well as supporting documentation relevant to the board’s vote.

Finance

1. Describe the financial resources that are necessary to implement the school’s expansion, including the projected sources of revenue that will ensure the fiscal viability of the school and the successful implementation of the proposed change(s). Describe contingency planning for potential challenges in cash flow or budget shortfalls due to lower than anticipated student enrollment or other financial challenges in the early years of expansion, include specific strategies.
2. Provide financial projections performed in planning for the proposed expansion. Financial projections should reflect both immediate and long-term considerations that the board and school leadership have identified in implementation of the proposed amendment. Provide a detailed narrative explaining the financial forecasts, and the underlying assumptions.
3. Describe the facility that will be used to meet the school’s needs and how it is accessible to individuals with physical disabilities and able to accommodate all students, and if modifications will be required. Indicate if the current facility will accommodate the expansion, or if additional space and/or renovations will be required.
4. Describe how transportation services are provided to all eligible students, and if modifications will be required. No later than February 1st, charter schools must notify the school district of all transportation needs for the following school year, including any changes resulting from the granting of an amendment, if the school district provides transportation for students who reside where the school is located.

School Performance

1. Explain trends and/or anomalies in attendance, chronic absenteeism, retention, stability, churn, attrition, in-school suspension rates, out-of-school suspension rates, and if applicable, emergency removal, graduation, and dropout data over the past five years. The Department performs a review using available student data in the aggregate, and by certain student groups, and grade cohorts using the [CHART tool](https://www.doe.mass.edu/charter/finance/chart/) at <https://www.doe.mass.edu/charter/finance/chart/>. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance.
2. The Department will conduct a review of the school’s academic performance on the [MCAS English language arts, mathematics, and science and technology/engineering tests](https://profiles.doe.mass.edu/statereport/nextgenmcas.aspx) for the most recent years available. School should explain trends and/or anomalies in past performance. Additionally, schools may submit student performance data for other standardized assessments in English language arts, mathematics, and science and technology/engineering as additional evidence of academic student achievement. Please indicate and define the metric used in your submission. Schools are required to submit at least three years of data for all students and one or more student groups.[[10]](#footnote-11)

# Instructions for Amendment to Maximum Enrollment and/or Grades Served

Any Commonwealth or Horace Mann charter school seeking to change its maximum enrollment and/or grades served must request approval from the Board. All requests must explicitly indicate within the request the proposed change to maximum enrollment and/or grades served in addition to providing information as described in these guidelines. All schools who seek to amend their charter through an expansion must submit a detailed request that addresses the associated criteria by the published annual deadline. The Department requires any re-submission of a previously unsuccessful request for expansion to respond to the deficiencies of the prior request as identified by the commissioner or the Board. Please contact the Department with any questions regarding your request, including seat availability or the proven provider requirements for [districts performing in the lowest 10 percent](http://www.doe.mass.edu/charter/enrollment/CapIncrease/).

The Department projects the number of additional seats available for each district in the Commonwealth under the net school spending (NSS) cap, including those districts where the cap is raised. The estimated number of seats available in each district is updated annually in the *District Information on Enrollment Projections* and can be found at <http://www.doe.mass.edu/charter/governance/?section=requests>. Any Commonwealth charter school considering an amendment request to **increase maximum enrollment** should review the availability of seats in their targeted district(s) prior to developing and submitting their request.

**The actual number of seats that will be available in any district in any particular year cannot be predicted with certainty and is dependent on several factors, including district enrollment, district spending levels, student enrollment for existing charter schools, and potential changes to the applicable net school spending (NSS) cap for the district of interest. The availability of seats in any district is subject to change.**

***A Note about Expansions and Student Entry Points:*** As part of all amendment requests involving expansions, the Department evaluates and considers the degree to which schools provide admission for new students across all grade levels. To strengthen a request for expansion, the Department strongly encourages schools to increase access and admission of new students at as many grade levels as possible. In approving recent amendment requests, the Board has indicated its support for the growth of charter schools that provide student access beyond what is required in statute.

In rare instances, a school may seek to **decrease maximum enrollment and/or eliminate grades**. Please consult with the Department in these circumstances to ensure your request adequately addresses the unique parameters of this type of request.

The request must include the following components, as applicable.

* Charter Amendment Request Cover Sheet

Template: <https://www.doe.mass.edu/charter/governance/?section=requests>

* Charter Amendment Request Letter

Template: <https://www.doe.mass.edu/charter/governance/?section=requests>

* Charter Amendment Request (Response to Criteria)

Submission must contain complete responses to the criteria.

* Send a copy of the submitted amendment materials to the superintendent of the school districts from which the school enrolls or is expected to enroll students and certify to the Department that it has done so. Certification may come in a variety of forms, such as email, or proof of mailing via certified mail.
* Certification that the local school committee have approved the proposed changes (Horace Mann charter schools only)
* Certification that the teachers’ union has approved the proposed changes (only Horace Mann I and III) or certification that the majority of the school’s faculty has approved the proposed changes (only Horace Mann II)

## Criteria for Increasing Maximum Enrollment

Please address the following twenty-one criteria in your school’s submission.

Rationale for Expansion

1. Describe how the charter school has determined a need to increase the maximum enrollment, including how the board of trustees determined the need for the charter amendment, why the amendment should be granted by the Board, and specific concerns if the request is not granted. Strong evidence includes materials presented and discussed by the board of trustees prior to its vote, feedback from parent and faculty surveys, a historical pattern of an increase in submitted applications for admission, and a growing population of eligible students in the local district or sending region.
2. Describe the input provided by the school community in the school’s proposed amendment, including families interested in enrolling their child(ren). Include a detailed explanation of how community input was collected and incorporated into the request.
3. Describe how the school has determined that there is sufficient parent support and interest to fill current and proposed seats at the school under the proposed amendment, including support from families of prospective students as well as current students.

Planning for Enrollment

1. Indicate, in a table, both the historical distribution of enrolled students in the present grade span, and the projected distribution of students by grade, including the primary entry points for new students and the grades where backfilling will occur. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. The table should reflect the implementation timeline, projecting a five-year enrollment pattern, or more if necessary, to project the total maximum enrollment requested. In your projection, clearly indicate the potential for variation in enrollment to safeguard against the need for a future minor amendment if granted. In addition to the table, please briefly describe current enrollment and backfilling processes, including how grade-level enrollment is determined and how and when vacancies are filled if students withdraw. Please describe any changes that may occur if the amendment is granted.
2. If a regional charter school, provide a projection of how the increase in maximum enrollment will impact enrollment distribution from your sending districts or region. Explain the basis for your projection. Please factor into your projection the current availability of seats under the applicable net school spending cap (see *District Information on Enrollment Projections* at <http://www.doe.mass.edu/charter/governance/>).
3. Submit a draft enrollment policy and application for admission which reflects the proposed change to entry point(s) and backfilling of vacancies, as applicable. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. [*If the school’s request is approved by the Board of Elementary and Secondary Education, the Department will work directly with the school to provide provisional approval of a revised enrollment policy and application for admission and ensure timely approval by the commissioner prior to the next enrollment period.]*

Educational Program

1. Describe how an increase in enrollment will enhance or expand the educational opportunities available for families and how the proposed change will provide benefits to the community. Incorporate a discussion regarding the key design elements of your school into your response.
2. Describe how families and the community have been engaged or will be engaged to ensure an instructional model that best serves students and their families, including students with disabilities and English learners.
3. Provide examples of how the school will or has involved parents/guardians as active partners in the education of their children and will build and maintain family-school partnerships that support students’ academic progress and social-emotional well-being. Include an explanation of how the school will or has engaged stakeholders, including new and current families, educators and staff, and community members in decision-making for the school.

Capacity

1. Describe how the staff will implement the request effectively and evaluate its success. Indicate the individuals involved throughout the process of implementation, and the systems in place for decision-making and communication among all members of the school community.
2. Provide a complete staffing chart that assumes full implementation of the requested amendment. Provide a detailed narrative that explains the proposed staffing changes and describes how these changes support the planning and implementation of the amendment. Requests that do not include a staffing chart or narrative will be considered incomplete.
3. If the school contracts with an EMO, describe how the EMO will support the planning and implementation of the proposed amendment.
4. Provide an action plan for implementation. Describe the proposed strategies that will lead to a successful implementation of the proposed changes. Include: a timeline, action(s) to be taken, designated point person, and start date and projected completion date.

Governance

1. Describe how the board of trustees will implement the request effectively and evaluate its success. Provide details of the board’s role in planning and monitoring progress of the expansion.
2. Provide copies of the materials used by the board to arrive at its decision to pursue the proposed amendment, include agendas and approved board minutes (including all relevant board committee minutes) as well as supporting documentation relevant to the board’s vote.

Finance

1. Describe the financial resources that are necessary to implement the school’s expansion, including the projected sources of revenue that will ensure the fiscal viability of the school and the successful implementation of the proposed change(s). Describe contingency planning for potential challenges in cash flow or budget shortfalls due to lower than anticipated student enrollment or other financial challenges in the early years of expansion, include specific strategies.
2. Provide financial projections performed in planning for the proposed expansion. Financial projections should reflect both immediate and long-term considerations that the board and school leadership have identified in implementation of the proposed amendment. Provide a detailed narrative explaining the financial forecasts, and the underlying assumptions.
3. Describe the facility that will be used to meet the school’s needs and how it is accessible to individuals with physical disabilities and able to accommodate all students, and if modifications will be required. Indicate if the current facility will accommodate the expansion, or if additional space and/or renovations will be required.
4. Describe how transportation services are provided to all eligible students, and if modifications will be required. No later than February 1st, charter schools must notify the school district of all transportation needs for the following school year, including any changes resulting from the granting of an amendment, if the school district provides transportation for students who reside where the school is located.

School Performance

1. Explain trends and/or anomalies in attendance, chronic absenteeism, retention, stability, churn, attrition, in-school suspension rates, out-of-school suspension rates, and if applicable, emergency removal, graduation, and dropout data over the past five years. The Department performs a review using available student data in the aggregate, and by certain student groups, and grade cohorts using the [CHART tool](https://www.doe.mass.edu/charter/finance/chart/) at <https://www.doe.mass.edu/charter/finance/chart/>. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance.
2. The Department will conduct a review of the school’s academic performance on the [MCAS English language arts, mathematics, and science and technology/engineering tests](https://profiles.doe.mass.edu/statereport/nextgenmcas.aspx) for the most recent years available. School should explain trends and/or anomalies in past performance. Additionally, schools may submit student performance data for other standardized assessments in English language arts, mathematics, and science and technology/engineering as additional evidence of academic student achievement. Please indicate and define the metric used in your submission. Schools are required to submit at least three years of data for all students and one or more student groups.[[11]](#footnote-12)

## Criteria for Increasing Maximum Enrollment and Adding One or More Grades

Please address the following twenty-eight criteria in your school’s submission.

*Rationale for Request*

1. Describe how the charter school has determined a need to increase the maximum enrollment and to change the grades served, including how the board of trustees determined the need for the charter amendment, why the amendment should be granted by the Board, and specific concerns if the request is not granted. Strong evidence includes materials presented and discussed by the board of trustees prior to its vote, feedback from parent and faculty surveys, a historical pattern of an increase in submitted applications for admission, and a growing population of eligible students in the local district or sending region.
2. Describe the input provided by the school community in the school’s proposed amendment, including families interested in enrolling their child(ren). Include a detailed explanation of how community input was collected and incorporated into the request.
3. Describe how the school has determined that there is sufficient parent support and interest to fill current and proposed seats at the school under the proposed amendment, including support from families of prospective students as well as current students.

Planning for Enrollment

1. Indicate, in a table, both the historical distribution of enrolled students in the present grade span, and the projected distribution of students by grade, including the primary entry points for new students and the grades where backfilling will occur. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. The table should reflect the implementation timeline, projecting a five-year enrollment pattern, or more if necessary, to project the total maximum enrollment requested. In your projection, clearly indicate the potential for variation in enrollment to safeguard against the need for a future minor amendment if granted. In addition to the table, please briefly describe current enrollment and backfilling processes, including how grade-level enrollment is determined and how and when vacancies are filled if students withdraw. Please describe any changes that may occur if the amendment is granted.
2. If a regional charter school, provide a projection of how the increase in maximum enrollment and change in grades served will impact enrollment distribution from your sending districts or region. Explain the basis for your projection. Please factor into your projection the current availability of seats under the applicable net school spending cap (see *District Information on Enrollment Projections* at <http://www.doe.mass.edu/charter/governance/>).
3. Submit a draft enrollment policy and application for admission which reflects the proposed change to entry point(s) and backfilling of vacancies, as applicable. The Department strongly encourages schools to promote new student access under the proposed expansion, and to explicitly indicate access for new students at as many grade levels as possible. [*If the school’s request is approved by the Board of Elementary and Secondary Education, the Department will work directly with the school to provide provisional approval of a revised enrollment policy and application for admission and ensure timely approval by the commissioner prior to the next enrollment period.]*

Program Delivery

1. Describe how an increase in enrollment and a change in grade span enhances or expands the educational opportunities available for families and how the proposed change will provide benefits to the community. Incorporate a discussion regarding the key design elements of your school into your response.
2. Describe how the proposed change to grades served and increase in enrollment will impact any key design elements of the current educational program or curriculum model. Provide examples of how the key design elements of the current school model will be reflected in the additional proposed grades.
3. Describe how families and the community have been engaged or will be engaged to ensure an instructional model that best serves students and their families, including students with disabilities and English learners.
4. Provide examples of how the school will or has involved parents/guardians as active partners in the education of their children and will build and maintain family-school partnerships that support students’ academic progress and social-emotional well-being. Include an explanation of how the school will or has engaged stakeholders, including new and current families, educators and staff, and community members in decision-making for the school.
5. Describe any schedule changes anticipated with implementation of the new grade span, including length of school year, week, or day. Describe how the change in grade span will impact the mechanics of the educational program in terms of the daily and weekly organization of students and faculty.
6. Provide an overview of how the current educational program, curriculum model, or whole school design, including curriculum and instruction, will be adapted to serve younger or older students, as applicable.
7. Describe the processes used for ensuring that the school’s curriculum is aligned to Massachusetts curriculum frameworks, aligned vertically between grades, and aligned horizontally across classrooms at the same grade level.
8. Describe a timeline for curriculum development and implementation, if applicable, including the individuals involved.
9. Describe the process and procedures used to evaluate whether curriculum and instruction is effective and successfully implemented. Include in your response a brief summary of the assessment system implemented at the school, and any modifications if request is granted.
10. If the request would create a grade grouping not currently served by the school, e.g., elementary school, middle school, high school, provide descriptions of the courses in the new grade groupings, including the content and skills to be taught in the core content areas.

Capacity

1. Describe how the staff will implement the request effectively and evaluate its success. Indicate the individuals involved throughout the process of implementation, and the systems in place for decision-making and communication among all members of the school community.
2. Provide a complete staffing chart that assumes full implementation of the requested amendment. Provide a detailed narrative that explains the proposed staffing changes and describes how these changes support the planning and implementation of the amendment. Requests that do not include a staffing chart or narrative will be considered incomplete.
3. If the school contracts with an EMO, describe how the EMO will support the planning and implementation of the proposed amendment.
4. Provide an action plan for implementation. Describe the proposed strategies that will lead to a successful implementation of the proposed changes. Include: a timeline, action(s) to be taken, designated point person, and start date and projected completion date.

Governance

1. Describe how the board of trustees will implement the request effectively and evaluate its success. Provide details of the board’s role in planning, and monitoring progress of the expansion.
2. Provide copies of the materials used by the board to arrive at its decision to pursue the proposed amendment, include agendas and approved board minutes (including all relevant board committee minutes) as well as supporting documentation relevant to the board’s vote.

Finance

1. Describe the financial resources that are necessary to implement the school’s expansion, including the projected sources of revenue that will ensure the fiscal viability of the school and the successful implementation of the proposed change(s). Describe contingency planning for potential challenges in cash flow or budget shortfalls due to lower than anticipated student enrollment or other financial challenges in the early years of expansion, include specific strategies.
2. Provide financial projections performed in planning for the proposed expansion. Financial projections should reflect both immediate and long-term considerations that the board and school leadership have identified in implementation of the proposed amendment. Provide a detailed narrative explaining the financial forecasts, and the underlying assumptions.
3. Describe the facility that will be used to meet the school’s needs and how it is accessible to individuals with physical disabilities and able to accommodate all students, and if modifications will be required. Indicate if the current facility will accommodate the expansion, or if additional space and/or renovations will be required.
4. Describe how transportation services are provided to all eligible students, and if modifications will be required. No later than February 1st, charter schools must notify the school district of all transportation needs for the following school year, including any changes resulting from the granting of an amendment, if the school district provides transportation for students who reside where the school is located.

School Performance

1. Explain trends and/or anomalies in attendance, chronic absenteeism, retention, stability, churn, attrition, in-school suspension rates, out-of-school suspension rates, and if applicable, emergency removal, graduation, and dropout data over the past five years. The Department performs a review using available student data in the aggregate, and by certain student groups, and grade cohorts using the [CHART tool](https://www.doe.mass.edu/charter/finance/chart/) at <https://www.doe.mass.edu/charter/finance/chart/>. Schools should explain any unique circumstances related to published school data, and corrective actions taken to address challenges in any of these areas of school performance.
2. The Department will conduct a review of the school’s academic performance on the [MCAS English language arts, mathematics, and science and technology/engineering tests](https://profiles.doe.mass.edu/statereport/nextgenmcas.aspx) for the most recent years available. School should explain trends and/or anomalies in past performance. Additionally, schools may submit student performance data for other standardized assessments in English language arts, mathematics, and science and technology/engineering as additional evidence of academic student achievement. Please indicate and define the metric used in your submission. Schools are required to submit at least three years of data for all students and one or more student groups.[[12]](#footnote-13)

1. The kinds of changes that require approval by the Board are defined in [603 CMR 1.10](https://www.doe.mass.edu/lawsregs/603cmr1.html?section=10). [↑](#footnote-ref-2)
2. Changes to existing management contracts must align to Department guidance and require consultation with the Department prior to submission to ensure timely approval by the commissioner and Board. [↑](#footnote-ref-3)
3. A charter school network exists when multiple charter schools are overseen by a single board of trustees. Each charter school within the network was granted its own charter. [↑](#footnote-ref-4)
4. Student groups will include students with disabilities, English learners, students identified as low income or economically disadvantaged, and categories of race/ethnicity. [↑](#footnote-ref-5)
5. In accordance with M.G.L. c. 71 § 89(n), if more than 20% of the school's total enrollment for two consecutive years comes from school districts not included in its original charter, the school's board of trustees must file an amendment request to reflect its actual enrollment patterns. [↑](#footnote-ref-6)
6. If available, the submission should include comparative performance data, national, statewide, or district(s), for all students and for one or more student groups in comparable grades. [↑](#footnote-ref-7)
7. A charter school may not introduce an enrollment preference within its charter region to admit only students whose districts provide preschool. Preschool students who are residents of districts that do not provide preschool cannot be paid for through charter school tuition. [↑](#footnote-ref-8)
8. See Charter School Transportation Technical Advisory at: <http://www.doe.mass.edu/charter/guidance/2016-1.html>. [↑](#footnote-ref-9)
9. If available, the submission should include comparative performance data, national, statewide, or district(s), for all students and for one or more student groups in comparable grades. [↑](#footnote-ref-10)
10. If available, the submission should include comparative performance data, national, statewide, or district(s), for all students and for one or more student groups in comparable grades. [↑](#footnote-ref-11)
11. If available, the submission should include comparative performance data, national, statewide, or district(s), for all students and for one or more student groups in comparable grades. [↑](#footnote-ref-12)
12. If available, the submission should include comparative performance data, national, statewide, or district(s), for all students and for one or more student groups in comparable grades. [↑](#footnote-ref-13)