

2019 Charter Renewal Handbook

Department of Evaluation and Assessment

COLORADO CHARTER SCHOOL INSTITUTE | 1580 LOGAN STREET STE 210 DENVER, CO 80203

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Background on Charter School Renewal

The authority to operate a charter school is granted through a limited-term, renewable contract. Contract renewal is not automatic – it must be earned through strong academic results, financial viability, and operational effectiveness. Charter schools are built around the promise of greater autonomy in exchange for greater accountability, and the renewal process provides an opportunity to review the charter school’s prior performance. A strong renewal process is critical to protect charter school autonomy, student rights, and the public interest, and ensures that schools are held to high standards.

Charter Renewal Timing

Upon initial approval as a charter school, the charter school receives authority to operate for a period of up to five years. Prior to the expiration of the initial charter contract, the charter school has the right to apply for the renewal of the initial charter. The charter renewal process primarily occurs during the last year of the charter term. An example charter renewal timeline is included below using a school with a five-year contract.

Sample Charter School Renewal Timeline for a 5-year Contract

Charter Contract July 1, 2014 – June 30, 2019

2014-2015	First year under charter contract
2015-2016	Second year under charter contract
2016-2017	Third year under charter contract
2017-2019	Fourth year under charter contract Begin renewal process in the spring
2019-2019	Fifth year under charter contract Renewal process occurs in summer/fall with board action in December Contract finalized in the spring and executed prior to May
2019-2020	First year under renewed charter contract

The CSI Renewal Handbook provides school leaders and school board members with a clear overview and description of the charter renewal process.

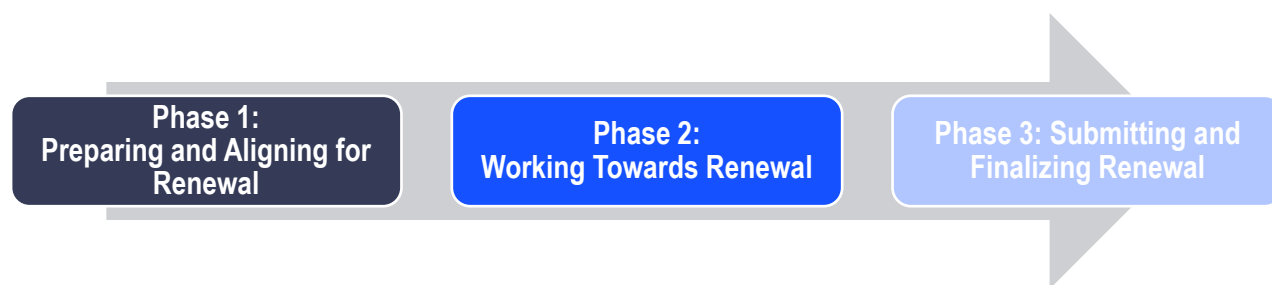
CSI Charter Renewal Process Overview

The primary driver of the renewal evaluation is the CSI Annual Review of Schools. The CSI Annual Review of Schools (CARS) is the system used to annually evaluate and accredit schools based on the CSI Academic, Financial, and Organizational Performance Frameworks. CARS builds upon the evaluation lens utilized by the State—which evaluates academic achievement, academic growth, and postsecondary and workforce readiness—by including additional measures related to academic, financial, and organizational performance to provide a more

comprehensive and robust evaluation that includes strong indicators of charter viability and sustainability.

While the majority of the renewal evaluation is based on the evidence of school performance over the charter term, the CSI charter renewal process provides schools with the opportunity to present new or supplemental evidence around school performance in the areas of academics, finances, and organization/governance outside of the information annually captured in the CARS Report.

The CSI charter renewal process is broken into three phases that are designed to streamline the process and align various components of the charter renewal process with ongoing school processes.



The information gathered during the renewal process will help to augment the CSI Renewal Report, in addition to the information included in the CARS Report and existing body of evidence, and may serve to inform the renewal contract, identify areas of needed CSI support, and/or update CSI records.

School Board and School Leader Roles

The renewal process requires the involvement of both the school leader and the school board. While the school leader will be the main point of contact throughout the renewal, the school board should expect to be engaged with the renewal process regularly, especially when interacting with the CSI Board of Directors. In addition, many school leaders will include members of their leadership team and other key school staff (finance/business manager, instructional coach, school accountability committee, etc.) in the renewal process.

A high-level overview of the roles of each party is outlined below; however, there is overlap between the parties, and the school leader should be involved in the work of the school board, and the school board should review/approve the material developed by the school leader.

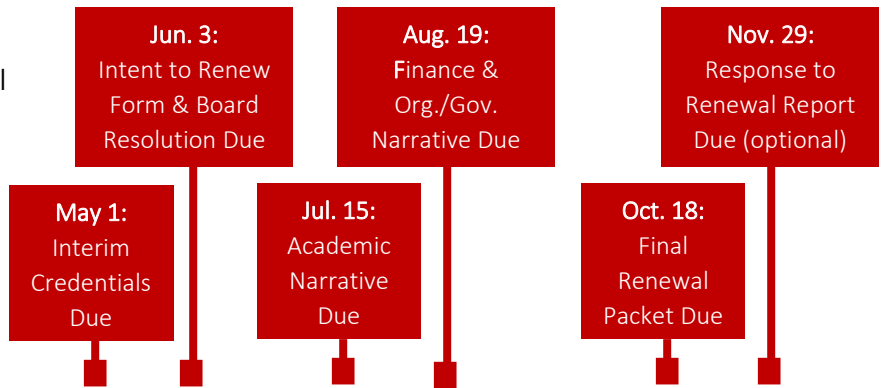
School Leadership	School Board
Academic narrative	Strategic planning
Financial documents	Board meeting and minutes checklist
Organizational/governance documents	Board self-evaluation
Waiver & policy review	Waiver & policy review
Engagement with CSI staff and board	Engagement with CSI board

This handbook breaks the renewal process up into three phases and presents an overview as well as a more detailed description of the various actions and steps related to submissions.

Renewal Timeline and Submissions Overview

Timeline and Submissions Key

- Submission Dates
- Phase 1: Preparing and Aligning for Renewal
- Phase 2: Working Towards Renewal
- Phase 3: Submitting and Finalizing Renewal
- Occurs during multiple phases
- Potential Dates



Renewal Events	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sept.	Oct.	Nov.	Dec.
CSI Attends School Board Meeting											
Kick-Off Phone Call with CSI											
CSI Releases CSI Renewal Handbook											
Monthly Phone Call with CSI (as needed)											
Prepare for and Schedule the Site Visit											
CSI Renewal Site Visit Takes Place											
CSI Attends School Board Meeting											
School Works on Submissions											
CSI Regional Board of Director Meeting							Denver	Western Slope	Colorado Springs		
SPF and CARS Report is Released											
Renewal Submission Revised											
Q&A with CSI Board PM Committee											
Renewal Report Released to School											
Renewal Report Discussed by CSI Board											
CSI Board Action – Final Renewal Decision											

Timeline and Submissions by Renewal Phase

Phase 1: Preparing and Aligning for Renewal

This phase of renewal begins in the spring prior to the renewal year. During this phase, CSI staff will engage with the school leader and school board to outline the renewal process and support the school in aligning existing processes for renewal.

Timeline

- February-April 2019: CSI staff attend school board meeting to provide an overview of the renewal process
- March 2019: Kick-off phone call with applicant
- March 2019: CSI releases CSI Renewal Handbook
- April 2019: Monthly phone call with applicant (as needed)
- April 2019: Review Unified Improvement Plan and begin updating
- April/May 2019: Review school board calendar and plan for board actions required as a part of renewal (strategic plan, board self-evaluation/needs assessment, etc.)

School Submission Requirements*

Item	Due Date	Notes
Interim assessment login credentials	5/1/2019	Submit to Aislinn Walsh (aislinnwalsh@csi.state.co.us)
Intent to renew form and signed board resolution	6/3/2019	Items to submit: <ul style="list-style-type: none"> <input type="checkbox"/> Complete, sign, and submit the intent to renew form attached to this letter which includes verifying/updating school profile information <input type="checkbox"/> School board resolution requesting charter renewal

**Unless otherwise noted, all submissions should be sent to Ryan Marks (ryanmarks@csi.state.co.us).*

Phase 2: Working towards Renewal

The second phase of the renewal process takes place during the summer and early fall prior to the renewal year. During this phase, the school leader and school board work towards completing the required renewal submissions and plan for the CSI Renewal Site Visit. CSI staff will continue to engage with both school leader and school board to provide support and guidance in this work. In addition, CSI staff will attend a school board meeting to learn about the school's strategic plan and the results of the school board's self-evaluation.

Timeline

- Beginning April 2019: Prepare for and schedule the CSI Renewal Site Visit (site visits will occur in May, August, September, or October)
- May 2019: Monthly phone call with applicant (as needed)
- May/August/September/October 2019: CSI Renewal Site Visit
- May/June/August/September/October 2019: CSI staff will attend either one or two school board meetings (one may overlap with the CSI Renewal Site Visit)
- June/July 2019: School works on submission requirements (Academic Narrative, Financial Submission, Organizational/Governance Documents) and optional review of existing school documents
- June 2019: Monthly phone call with applicant (as needed)

School Submission Requirements

Item	Due Date	Notes
Academic Narrative	7/15/2019	Items to submit: <ul style="list-style-type: none"> <input type="checkbox"/> Current Performance and Data Analysis <input type="checkbox"/> Areas of Priority Improvement and Root Cause Analysis <input type="checkbox"/> Major Improvement Strategies <i>Note: Schools may submit their UIP draft to fulfill this requirement if the UIP sufficiently addresses the required areas needed as a part of the academic narrative for renewal.</i>
Financial Documents	8/19/2019	Items to submit: <ul style="list-style-type: none"> <input type="checkbox"/> 3-year financial forecast for the next contract term (the following school year plus two additional years) <input type="checkbox"/> Financial policies and procedures
Organizational/Governance Documents	8/19/2019	Items to submit: <ul style="list-style-type: none"> <input type="checkbox"/> Organizational chart <input type="checkbox"/> Strategic plan <input type="checkbox"/> Board needs assessment <input type="checkbox"/> Updated and revised bylaws, if applicable <input type="checkbox"/> Updated and revised policies, if applicable <input type="checkbox"/> Waiver review and replacement plan update <input type="checkbox"/> Governing Documents Modification Form (if applicable)

Phase 3: Submitting and Finalizing Renewal

The third phase of charter renewal takes place from early fall through CSI Board action on renewal applications in December. During this phase, CSI staff will provide feedback on initial submission drafts, request any additional information based on the release of the State School Performance Framework and/or the CARS Report, conduct the CSI Renewal Site Visit if it hasn't occurred already, and support the school in preparing for their visit with the CSI board.

Timeline

- August 2019: Monthly phone call with applicant (as needed)
- August/September/October 2019: School leader and board members attend a CSI Regional Board of Director Meeting (August - Denver, September - Western Slope, October - Colorado Springs)
- September 2019: Release of the SPF and CARS Report
- September 2019: Monthly phone call with applicant (as needed)
- October 2019: Renewal submissions revised and resubmitted (as needed based on feedback from CSI staff and board, and the results of the SPF and CARS Report)
- November 12, 2019: Q&A with CSI board Performance Management Committee**
- November 25, 2019: Renewal Report released to school
- December 10, 2019: CSI board Performance Management Committee discussion of Renewal Report and Recommendation**
- December 17, 2019: CSI board action**

School Submission Requirements

Item	Due Date	Notes
Final Renewal Packet Submission	10/18/2019	In addition to submitting any required revisions to documents submitted in July/August, schools should submit reviewed bylaws (if applicable), policies, and waivers as outlined below ("Required Review").
Response to CSI Renewal Report (optional)	11/29/2019	Schools have the option to add supplemental evidence to the report, if vetted and approved by CSI staff.

***Dates subject to annual approval of the 2019-20 CSI Board of Directors Meeting schedule.*

Action & Submission Detailed Information and Resources

KEY: >> = Renewal Action □ = Renewal Submission

Phase 1: Preparing and Aligning for Renewal

>> **Schedule Initial Renewal Phone Call**

Description: CSI will work with the school to schedule a phone call in the early spring to review the renewal process and ensure that the school leader and board chair understand the renewal process. We will also schedule monthly phone calls with school leaders and board chairs (as needed) to ensure that there is an open and regular communication between CSI and the school throughout the renewal process.

Deadline: Complete initial phone call by April 1, 2019

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

□ **Submit Interim Assessment Login Credentials**

Description: Provide CSI with a username and password to the school's online assessment platform. Please ensure that this username is associated with the highest levels of permissions so CSI can pull the reports properly. CSI will conduct an analysis of the school's local interim assessment data as a supplement to the state assessment data for use in the school's improvement planning process and renewal evaluation.

Deadline: May 1, 2019

Contact: Please reach out to Aislinn Walsh (aislinnwalsh@csi.state.co.us) with any questions about this submission.

>> **Review Renewal Letter and Renewal Handbook**

Description: CSI will email the school leader and school board chairs in the spring prior to renewal to begin the renewal process. The email will include as attachments, a renewal letter which outlines the renewal process, the customized Intent to Renew form, and the CSI Renewal Handbook (this document).

Deadline: Complete by the end of May 2019

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

□ **Submit Intent to Renew Form and Board Resolution**

Description: Using the Intent to Renew form emailed to the school leader and board chair, school's should complete the form and submit to CSI to begin the renewal process. The Intent to Renew form includes basic information about the school which should be reviewed and corrected (if needed). A

school board resolution requesting charter renewal with CSI must also be submitted with the Intent to Renew.

Deadline: June 3, 2019

Contact: Please reach out to Aislinn Walsh (aislinnwalsh@csi.state.co.us) with any questions about this submission.

Resources: [SAMPLE Signed Board Resolution Requesting Charter Renewal](#)

» **CSI Staff Attend School Board Meeting**

Description: CSI staff will share an overview of the renewal process with the school board, as well as outline expectations for school board involvement in the renewal process. School boards will be provided with checklists and guiding questions as well as a self-evaluation template. CSI will schedule a second board visit during the second phase of the charter renewal process, at which time the school board will share the results of their self-evaluation as well as their most recent strategic plan.

Deadline: Complete by the end of May 2019

Contact: CSI will contact the school leader to schedule attendance at a scheduled school board meeting. Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

» **Review Unified Improvement Plan and Begin Updating**

Description: The Unified Improvement Plan (UIP) plays a central role in the renewal process and the schools going through renewal should be reviewing their most recent UIP and begin the update the UIP with renewal in mind. CSI will provide UIP training and supports for all schools in the spring as they complete their annual improvement planning process.

While the UIP forms the core of the academic narrative for renewal, there is specific guidance for schools going through renewal regarding the nature and extent of the content that should be included in the UIP. Please see the school submission requirement in Phase 2 for more information.

Deadline: Ongoing; complete first review by the end of May 2019

Contact: Please reach out to Jessica Welch (jessicawelch@csi.state.co.us) with any questions about this action.

Resources: [CSI UIP Webpage](#)
[CSI UIP Handbook](#)
[CDE UIP Webpage](#)
[Academic, Financial, and Organizational/Governance Requirements for Renewal](#)

Phase 2: Working Towards Renewal

➤ Schedule CSI Renewal Site Visit

Description: The CSI Renewal Site Visit will primarily focus on corroborating and augmenting the information found in the charter renewal application and the CARS Report, and will help to verify that the school is implementing improvement strategies with fidelity. CSI Renewal Site Visits may occur in May, September, or October.

The CSI Renewal Site Visit structure will parallel the structure of the CARS Report. While the site visit protocol will primarily focus on areas for school improvement, the visit will also include an opportunity for the school to highlight components of their program that are unique or are related to the school mission. The Review Team and the school leader will establish clear and observable outcomes for the site visit through the pre-visit questionnaire and pre-visit planning meeting.

The CSI Renewal Site Visit is required for schools if this is the school's first renewal with CSI, the school rating is below Performance (at any level, if school serves multiple levels), and/or this is the school's first year with a Performance rating (if previous rating was lower than Performance). Schools who do not fall into the above categories are encouraged, but not required, to participate in a site visit.

Deadline: Site visits should be scheduled at least one month prior to the site visit date. Site visit must be scheduled by September 16, 2019.

Contact: Please reach out to Jessica Welch (jessicawelch@csi.state.co.us) with any questions about this action.

Resources: [CSI Renewal Site Visit Protocol](#)
[CSI Renewal Site Visit Checklist](#)
[CSI Renewal Site Visit Pre-Visit Questionnaire](#)

➤ Work on Academic, Financial & Organizational/Governance Submissions

Description: Schools should begin working on completing the required academic, financial, and organizational/governance submissions during the late spring and over the summer. Many of the submissions and documents that are required should already exist but will need to be reviewed and updated as needed prior to submission to CSI as a part of the renewal application.

Academic Submission Requirements:

- Current performance and data analysis
- Areas of priority improvement and root cause analysis
- Major improvement strategies

Note: Schools may submit their UIP draft to fulfill this requirement if the UIP sufficiently addresses the required areas need as a part of the

academic narrative for renewal.

Financial Submission Requirements:

- 3- year financial forecast
- Financial policies and procedures

Organizational/Governance Submission Requirements:

- Organizational chart
- Strategic plan
- Board self-evaluation
- Updated bylaws, if applicable
- Updated and revised policies, if applicable
- Waiver review and replacement plan update
 - Review current waivers and update replacement plans
 - New waiver request/replacement plans (if applicable)
- Governing Documents Modification Form (if applicable)

Deadline: July 15, 2019 – Academic submission
August 19, 2019 – Financial and Organizational submission

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

Resources: [Academic, Financial, and Organizational/Governance Requirements for Renewal](#)
[CSI Finance Forecast Template](#)
[Board Strategic Plan Overview and Example](#)
[CSI Strategic Planning Guide for Charter School Boards \(pending\)](#)
[Financial Policies and Procedures Rubric \(pending\)](#)

» **CSI Staff Attend School Board Meeting**

Description: During this meeting, the school board will provide an update on their progress towards completing the renewal requirements with a focus on the results of the board self-evaluation and the school strategic plan. CSI staff may ask for additional information during this board meeting, depending on any areas of concern (academic, financial, or organizational/governance) identified in advance. In preparation for this meeting, boards should review the Board Meeting and Minutes Compliance Checklists and complete a self-evaluation prior to this meeting. The school board should also review the Guiding Questions for School Boards as they work with the school leader during Phase 2.

Deadline: Complete prior to early September and before presentation in front of the CSI Board. This can be scheduled to align with the CSI Renewal Site visit.

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

Resources: [Board Meeting Compliance Checklist](#)

Phase 3: Submitting and Finalizing Renewal

➤ **Complete the CSI Renewal Site Visit**

Description: The CSI Renewal Site Visit will primarily focus on corroborating and augmenting the information found in the charter renewal application and the CARS Report, and will help to verify that the school is implementing improvement strategies with fidelity.

Deadline: CSI Renewal Site Visits may occur in May, September, or October.

Contact: Please reach out to Jessica Welch (jessicawelch@csi.state.co.us) with any questions about this action.

Resources: [CSI Renewal Site Visit Protocol](#)
[CSI Renewal Site Visit Checklist](#)
[CSI Renewal Site Visit Pre-Visit Questionnaire](#)

➤ **Engage with the CSI Board of Directors**

Description: Schools will attend a regional CSI Board meeting in the fall of renewal year. Schools will not be asked to prepare a presentation for this meeting. Rather, this is an opportunity for the CSI Board to ask questions to augment the information provided by the school in the areas of academics, finance, and organization/governance. CSI staff will be available to meet with the school leader in preparation for this meeting. In addition to the school leader, schools board members are strongly encouraged to attend this meeting.

Deadline: Denver Regional CSI Board Meeting - August
Western Slope Regional CSI Board Meeting - September
Colorado Springs Regional CSI Board Meeting – October

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

Revise and Re-submit Academic, Financial & Organizational/Governance Submissions

Description: After initial submissions are made in July and August, CSI staff and/or the CSI Performance Management Committee may provide feedback and/or request additional information based on the 2019 SPF and CARS Report. Schools will have until the final submission date in October to make requested changes and submit additional information/documentation.

Deadline: Ongoing as feedback is received
Final renewal packet is due on October 18, 2019.

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

Resources: [Academic, Financial, and Organizational/Governance Requirements for Renewal](#)
[Board Strategic Plan Overview and Example](#)
[CSI Strategic Planning Guide for Charter School Boards \(pending\)](#)
[CSI Finance Forecast Template](#)
[Financial Policies and Procedures Rubric \(pending\)](#)

➤ **Attend the November CSI Performance Management Committee Meeting**

Description: The CSI Performance Management committee will review each renewal school's academic, financial, and organizational performance from the prior contact term. The school leader and school board members are encouraged to attend (either in-person or virtually).

Deadline: November 12, 2019

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

➤ **Review the CSI Renewal Report**

Description: The CSI Review Team will examine the existing body of evidence and complete a comprehensive and robust evaluation that considers indicators of charter viability and sustainability as well as the renewal application.

The draft report is released to the school leader and board chairs in advance of the December PM Committee and CSI Board meetings in order to ensure that the information contained in the report is an accurate reflection of the school performance. Applicants are encouraged to review the report, ask any clarifying questions about the evidence included in the report, and identify any errors.

The CSI Renewal Report, including the recommendation, will be shared with the school leader and board chairs before the report and recommendation are provided to the CSI Board.

Deadline: November 29, 2019 (if providing feedback to CSI)

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

➤ **Attend the December CSI Performance Management Committee Meeting**

Description: The CSI Performance Management committee will review the CSI Renewal Report and Recommendation and discuss potential board action and draft a recommendation to provide to the CSI Board of Directors regarding board action on the renewal applications. The school leader and school board members are encouraged to attend (either in-person or virtually).

Deadline: December 10, 2019

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

➤ **Attend the December CSI Board of Directors Meeting**

Description: The CSI Board of Directors will review the CSI Renewal Report and Recommendation, hear the recommendation from the Performance Management Committee, discuss potential board action, and take action on the renewal applications. Applicants are encouraged to review the report, ask any clarifying questions about the evidence included in the report, and identify any errors.

Deadline: December 17, 2019

Contact: Please reach out to Ryan Marks (ryanmarks@csi.state.co.us) with any questions about this action.

Appendix

Academic, Financial, and Organizational/Governance Requirements for Renewal

[Academic, Financial, and Organizational/Governance Requirements for Renewal Document](#)

- This document contains an outline for all academic, financial, and organizational/governance requirements during the renewal process. Please be sure to review this after reading this handbook to get a better understanding of renewal requirements.

[CSI Strategic Planning Guide for Charter School Boards \(pending\)](#)

- This document contains a step-by-step guide to strategic planning developed by CSI to support charter school boards in developing a strategic plan. The document includes guidance around the strategic planning process, suggested content, and a template.

[CSI Finance Forecast Template](#)

- This document contains instructions on how to use the document, an enrollment forecast tab, a staffing forecast tab, a forecast assumptions tab, and a 3 year forecast tab to provide your school with an easier way to complete your financial forecast submission requirement.

[CSI Financial Policies and Procedures Rubric \(pending\)](#)

- This document contains guidance around the school financial policies and procedures.

CSI Renewal Site Visit Overview and Documents

[CSI Renewal Site Visit Protocol](#)

- This document provides the purpose of the renewal site visit and gives an overview of the process, including the general timeline and logistics.

[CSI Renewal Site Visit Checklist](#)

- To complement the above document, the checklist provides a list of tasks you should accomplish and when you should accomplish them for a successful renewal site visit.

[CSI Renewal Site Visit Pre-Visit Questionnaire](#)

- Prior to the site visit, CSI will schedule a phone call with the school leader to discuss all of the items available in this questionnaire. Please review this document prior to this phone call to have responses prepared. You do not need to fill out this document, as CSI will send a completed version after your phone call discussion.

[Site Visit Review Team Materials](#)

- This document will be used by the CSI site visit review team during your site visit. If you would like to have an idea of how your school will be evaluated during the site visit, please consult this document.

Board-Specific Resources

[Board Focus and Guiding Questions](#)

- This document has a sample governing board focus outline table and a sample governing board focus by month table, along with guiding questions for academic data presentations.

[Board Meeting Compliance Checklist](#)

- To ensure your school board meetings are compliant with legal requirements and best practices, your board can fill out this checklist.

[Board Minutes Compliance Checklist](#)

- To ensure your school board minutes are compliant with legal requirements and best practices, your board can fill out this checklist.

[Board Strategic Plan Overview and Example](#)

- This document outlines the purpose and process of creating your school board's strategic plan. School boards can use the sample at the end of this document of another school's strategic planning form they provided to their school board.

[Governance Needs Assessment](#)

- This is a sample board needs assessment/self-evaluation. To use this document, you can either print it or fill it out in Excel. The instructions page and the instructions at the top of each tab provide information on how to fill out the forms. If you fill it out in Excel, ratings will auto populate based on your responses. Please reach out to Aislinn Walsh (aislinnwalsh@csi.state.co.us) with any questions about using this document.

[SAMPLE Signed Board Resolution Requesting Charter Renewal](#)

- This document provides a sample board resolution for requesting charter renewal with CSI. Your board can use this completed document to submit your board's resolution to request renewal, due June 1st.