

## **Academic Narrative Requirements**

Academic narratives will be reviewed by CSI staff for accuracy and depth of analysis. CDE's Quality Criteria for Improvement Planning will be used as a framework for this review.

At a minimum, schools must address any area where students did not meet state expectations, based on the most recently available state assessment results. This includes both overall indicators, and sub-group populations.

Schools who fall into the following categories will be subject to a more in-depth review by CSI:

- Schools with any level (elementary, middle, or high) with a School Performance Framework (SPF) rating that falls below Performance.
- Schools who have received a Priority Improvement or Turnaround rating, at any level, during the past three years (regardless of current rating).

Below are the narrative requirements.

### **Current Performance and Data Analysis**

- Description of current state of the school (academic, but may also include cultural and 'whole child' indicators)
- Description of and references to state and interim assessment data
- Include disaggregation of data, and the comparison of disaggregated groups to the school as a whole.
- Synthesis of performance data
- Avoid simply sharing data; you may include charts/tables, but be sure to include a descriptive analysis and/or take-away from any data shared
- Summary of school's SPF and CARS report (if available)
- Must include data and analysis of any area that school fell below Meets; may highlight and/or include indicators that were at or above Meets as well.
- Trend Statements (three years if available)
- Include both positive and negative trends in both state and interim assessment data
- Describe the impact of the previous improvement efforts
- Connect to previous Improvement Strategies
- Were they effective? If so, why? If not, why not?

### **Areas of Priority Improvement and Root Cause Analysis**

- Given the school's current and historical data, what are the biggest areas of academic improvement?
- Thorough analysis of both quantitative and qualitative data, present the underlying causes behind each area of academic improvement. These should be the root causes, which, if addressed, would result in the elimination or substantial reduction of the academic challenges.

- Areas of priority improvement and root cause identification should be verified/supported through multiple data points.
- Root causes must be areas under the school's control; not focused on students or families.

### **Major Improvement Strategies**

- Include detailed information on the improvement strategies the school has selected to address the root causes identified. Schools must identify which root cause/area of improvement each strategy will address, and detail the desired outcome and high level implementation steps.

## **Financial Submission Requirements**

### **3-year Financial Forecast**

- Schools should use the template (link in Resource Appendix) to complete a three year financial forecast. This should include information from the previous fiscal year, the current fiscal year, and the next three years. CSI may ask for additional information once the annual budget audit has been completed in October.

### **Financial Policies and Procedures**

- Schools must submit a copy of all current financial policies and procedures.

## **Organizational/Governance Submission Requirements**

### **Organizational Chart**

- Schools should provide a complete, current organizational chart. If any changes to the organizational structure are planned, schools should submit both a current organizational chart and a chart that represents the planned changes.

### **Strategic Plan**

- School boards will present the current strategic plan during the second CSI board visit. School boards should submit a hard copy of the strategic plan prior the presentation.

### **Board Self-Evaluation**

- School boards should engage in a self-evaluation that covers the following areas:
  - School Vision and Mission
  - Policies, Compliance, and Board Responsibilities
  - Bylaws
  - Communication
  - Service to Special Populations
  - Fiduciary Duties
  - Board Membership (adherence to bylaws; diversity in experience)
  - Board/School Leader Relationship
  - Board Needs and Training
  - Authorizer Relationship

A sample school board needs assessment can be found at our website: [Governance Needs Assessment](#)

## Updated and Revised Policies

### □ **Required review and re-submission**

Schools are required to review the following documents, make any necessary modifications or changes, and re-submit to CSI as a part of the renewal process. *Please submit the revised documents in draft form prior to formal school board approval.* Edits and information included in these key policy reviews will not be evaluated and considered as a part of the renewal decision-making process; however, these documents must be updated and revised to ensure that they comply with federal, state, and CSI rules and requirements. The documents are:

- School enrollment policy
- School bylaws
- Governing board roster with terms, officer roles and if appointed or elected
- EMO/ESP management agreement (if applicable)
  - For more information see [Evaluating Education Service Provider \("ESP"\) Agreements](#)

### □ **Waiver review and replacement plan update**

All Schools must submit a new set of waiver requests along with rationale and replacement plans for all non-automatic waivers to be included in the renewal contract. All current waivers will expire at the end of the current contract term.

- Waiver Compliance Review: Schools are responsible for adhering to the replacement plans set forth in their approved waivers. Prior to drafting and submitting new waiver requests for the term of the renewal contract, Schools should review the Waiver Guidance document available here ([http://www.csi.state.co.us/school\\_resources/legal\\_policy/waivers](http://www.csi.state.co.us/school_resources/legal_policy/waivers)) and perform a self-assessment to ensure that the School has been able to comply with current waiver replacement plans prior to drafting and submitting new waiver requests.
- Waiver Requests: Although it is possible that much of the language from the School's current waiver request and replacement plans may be used for the new waiver request, it is highly likely that updates to state law and CDE guidance will require the School to revise its waiver requests. Accordingly, it is strongly recommended that the School reference the Waiver Template and Sample Language document posted here ([http://www.csi.state.co.us/school\\_resources/legal\\_policy/waivers](http://www.csi.state.co.us/school_resources/legal_policy/waivers)) and utilize that template and sample language when preparing its revised waiver requests. CSI will hold a webinar for all renewal schools to review waiver request requirements and answer questions.

### □ **Optional review**

Schools may also undertake a more thorough review of existing school documents as a part of the charter renewal process. This is not required but many school leaders and governing boards find it helpful to periodically review and update foundational or guiding documents. The list provided below is not exhaustive and is only provided as a resource.

- Evidence of good standing with the Colorado Secretary of State
- Board policy book
- Board/school dashboard
- Governing board conflict of interest policy and/or disclosure forms
- Parent/student handbook
- Course completion, promotion criteria or graduation criteria/policies
- Administrative procedures related to finance or operations
- Building safety plan (review annually)
- Sample employee agreements
- Staff handbook
- Staff job descriptions
- ESP employee or facility lease agreement, if applicable
- Other founding documents

□ **Governing Documents Modification Form (if applicable)**

Changes to any of the below items requires the submission of the Governing Documents Modification Form (found at

[http://www.csi.state.co.us/school\\_resources/legal\\_policy/govdocs](http://www.csi.state.co.us/school_resources/legal_policy/govdocs)):

- Mission, vision
- Grievance policy
- Enrollment policy and procedures
- Education Service Provider (change in existing provider or existing provider's services, agreement, etc.)
- Non-Academic Programs (material change to existing programs or addition of non-academic programs such as Transportation, Food Service, etc. not included in the application)
- Grade level and enrollment (outside of any Institute-approved expansions)
- Educational program (special education plan, material change to existing programs or addition of programs such as Online Learning not included in the application)
- Interim assessments (change of assessment or administration)
- Calendar days, hours (reduction of 10% or more, 4 day week)
- \*Location modification (additional facility or change of facility)
- Insurance coverage (reduction of coverage)
- Contract modification due to clerical errors (typos, incorrect date, etc.)