



# **Charter School Revision Guidelines**

**New York State Board of Regents  
State Education Department**

**Charter School Office**

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## Overview

A revision is a change to the school design as set forth in the school's charter. These revisions may include, but are not limited to, changes to the academic program, governance structure, mission, key design elements, location of the school, and/or certain policies and procedures.

Revisions to a charter may require the approval of either the Board of Regents (for material revisions) or the Commissioner of Education through the New York State Education Department's Charter School Office (CSO) (for non-material revisions), before the school can implement the change.

There are several changes that do not constitute charter revisions, either material or non-material (including some enrollment changes<sup>1</sup>). There are also certain changes that are not considered material revisions but that may require other processes and/or approval by the CSO (e.g., adding members to the Board of Trustees). These guidelines are designed to provide general information about the process for requesting revisions to charters.

**Please Note: Where redlined documents are required, use the Track Changes feature in your word processing software to show the modified text (creating a redlined version for CSO review). Please submit actual pages with your tracked changes, not a summation of revised text. This can be limited to the relevant sections of any lengthy documents (in excess of 30 pages, like the charter), but should then include the entirety of those sections.**

In addition, changes to the school's charter, whether they are material or non-material, may not be implemented until approved by the CSO or the Board of Regents, whichever is applicable. Any proposed revisions or portions thereof that are not specifically approved are deemed denied. The CSO, on behalf of the Commissioner and the Board of Regents, may require you to submit additional information prior to consideration of the proposal.

## Submitting a Revision Request

1. All charter schools authorized by the Board of Regents have a staff member of the CSO designated as their liaison. **The required first step in this process is to contact your CSO liaison** for guidance and clarification regarding whether the revision request is material, non-material, or neither, and to determine whether there are any significant issues the school should consider and address before submitting the proposal. NYSED, not the school, determines if a revision is material, non-material, or neither. The CSO strongly recommends starting this process as soon as possible in the fall prior to the year of implementation of

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<sup>1</sup> Schools may go below their authorized enrollment for a given year without CSO or Regents approval, as long as they do not fall below 85% of the authorized enrollment for that year. Keep in mind that a school cannot exceed its authorized enrollment, cannot go below 85% of its authorized enrollment for a particular year, and cannot make any changes to the grades served without prior written approval.

the proposed revision. The school's CSO liaison is a resource that schools should use throughout the charter term, including early on in strategic planning discussions. Strong communication with your liaison throughout the revision process will save your school time. A liaison list is available on the CSO web site: <http://www.nysed.gov/charter-schools/contact-us> or by emailing [CharterSchools@nysed.gov](mailto:CharterSchools@nysed.gov).

2. Consider all revisions being sought for the upcoming academic year that can be submitted to the CSO. Submitting all revision requests simultaneously (but as separate requests) will result in faster processing time and a more coherent presentation to the Board of Regents. Revision requests at different times in a single academic year are strongly discouraged.
3. Prepare and submit the revision request(s) to the charter school's board of trustees for approval and prepare a separate board resolution that will be submitted with the board meeting minutes for the applicable meeting.
4. Submit the revision request and all required documents set forth in this document via the NYSED CSO Portal: <https://nysed-cso.smapply.io/>. Detailed instructions on how to access and navigate the portal are found on the CSO's webpage here: <http://www.nysed.gov/charter-schools/charter-revision-guidance-board-regents-authorized-charter-schools>. The CSO will **only accept** revision requests, both material and non-material, through the portal. Upon entering the portal, follow all prompts required for the revision and submit all required documents. If a required document does not apply to your revision request, upload a document that explains why the document is not applicable. **If a charter school is requesting multiple revisions, you must submit them as their own separate submission.** Follow the directions within the portal to do so.
5. SEDREF must be updated to reflect certain NYSED-approved material and nonmaterial revisions. To determine which revisions require SEDREF updates and to learn how to make those updates, please follow the instructions on our website for [updating your school's SEDREF information](#). When emailing NYSED Datasupport, please include a screenshot of the approval message you received from the CSO as proof that the revisions have been authorized.

### **Revision Deadlines**

Charter schools are strongly encouraged to plan ahead, no later than the fall of an academic year, regarding charter revisions, particularly those of a material nature. Therefore, all proposed material charter revisions must be submitted to the [NYSED CSO Portal](#) no later than **December 1<sup>st</sup> of the year prior to the academic year in which the proposed revision will commence**. For example, if a school wishes to implement a material charter revision in the 2025-2026 school year, the proposed material charter revision request must be submitted to the CSO no later than December 1, 2024. In the **rare** instance that extenuating circumstances preclude the submission of a proposed charter revision by the December 1<sup>st</sup> deadline (e.g., severe damage from a natural

disaster that interrupts operation of the school), the school should promptly contact its CSO liaison to discuss the need for the charter revision and the possibility of an alternative timeline for submitting the revision request. The CSO reserves the sole right to determine if a material revision request will be accepted for consideration after the December 1<sup>st</sup> deadline and schools should not rely on revisions submitted after December 1 being approved. Schools are asked to submit non-material revision requests *at least* 30 days prior to the proposed implementation date., with the exception of revision requests to change a school's admissions policy or enrollment processes, which must be submitted by the December 1st deadline for material revisions, to ensure the school has ample time to finalize the approved revisions to the policy and application, and provide notice to the public regarding the changes after CSO review and approval.

**If the charter school is in a renewal year**, when possible, requests for material and non-material revisions are **required** to be submitted with the school's application for charter renewal. Schools in a renewal year should use these guidelines to inform the inclusion of any revision requests in the renewal application, as directed in the renewal application guidelines.

Requests for changes to the name of charter schools or education corporations authorized by the Board of Regents **will not be considered or recommended** for approval by the Board of Regents except as part of an application for charter renewal or merger/consolidation. The only exceptions to this requirement will be:

1. If a school has the name of a community in its name and is seeking approval to relocate outside of that community. In those cases, the request for a name change should be made at the same time the request is made to relocate the school; or
2. If a school's name reflects an entity that provides comprehensive management services, a Charter Management Organization (CMO), or other partnership relationship that is being terminated. In those cases, the request for a name change should be made at the time the request to terminate the CMO/partnership relationship is made.

### **Understanding Material versus Non-Material Revisions**

NYSED is the sole determinant in identifying a revision request as a material or non-material change. The CSO liaison will review the school's request(s) and determine if a revision meets the criteria for a material revision as specified in the Rules of the Board of Regents (8 NYCRR §3.16(c)). Although there are exceptions, material revisions are considered to be those revisions that result in a significant change to the school's educational philosophy, key design elements, mission or vision, governance or leadership structure, curriculum model, or school design changes that are inconsistent with that approved in the current charter. Material revisions also include the hiring or termination of an entity that provides comprehensive management services, a change in school name, a change in location (if such revision results in relocation to another school district or borough in New York City), the maximum authorized enrollment, and/or grade levels served.

Non-material revisions are generally less significant changes to the school's educational philosophy, key design elements, mission or vision, governance or leadership structure, the curriculum model, or school design, as determined by the Commissioner. Non-material revisions may also include changes to the school's calendar or schedule, the school's by-laws, code of conduct, and/or major policies and procedures.

### **Submission Requirements<sup>2</sup> for ALL Revisions (Material and Non-Material)**

All required revision documents must be submitted through the [NYSED CSO Portal](#). The following information is required for each revision:

1. A completed cover letter form including:
  - a) The name and main address of the charter school;
  - b) The name, position, and contact information of the person submitting the revision request;<sup>3</sup>
  - c) The general details of the revision;
  - d) A justification for the revision; and
  - e) A proposed timeline for implementation.
2. Finalized board meeting minutes;
3. A signed board resolution<sup>4</sup> on school letterhead declaring the board's approval of the revision request;
3. A plan to share any proposed revisions with the school, parents/guardians, and community stakeholders, as well as prior and future engagement with such groups applicable to the proposed revision, if they may be impacted; and
4. Any other information that the school deems relevant to the proposed charter revision.

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<sup>2</sup> After the initial submission, the CSO may determine that additional materials and/or information not outlined in this document are required.

<sup>3</sup> If the person submitting the revision request is not the chairperson of the board of trustees, the revision must include a board resolution signed by the chairperson, indicating that the board of trustees has authorized the individual to submit the revision request on behalf of the board.

<sup>4</sup> The resolution should be signed by someone on the board (usually the chair or secretary), on school letterhead, and should refer to the board meeting date, the motion or resolution that was made, and the approval by the board. The resolution should also reflect what is set forth in the meeting minutes for the relevant action.

## **Material Revisions**

### **Common Material Revisions and the *Additional* Documents Required<sup>5</sup>**

**A. Revisions that fundamentally alter a school’s key design elements, mission, vision, or educational philosophy** must include the following:

1. A line-by-line “redlined” comparison of changes; and
2. A detailed explanation of how the proposed change has been *interwoven throughout the charter* so that it is a fundamental change for the school. For example, a key design change to serve economically disadvantaged students might include all of the following: free services and amenities for students in the budget, daily counseling and supports, family educational opportunities and resources, professional development to staff regarding the impact of poverty on learning, and partnership with community-based organizations.

**B. Significant changes in the organizational/leadership structure of the school (e.g., adding a new layer of administrative reporting)** must include the following:

1. A summary of the changes to organizational/leadership structure;
2. The current organizational chart;
3. The proposed organizational chart, highlighting any changes;
4. A revised staffing plan, including a summary of the roles and responsibilities for the school’s administrative and leadership staff; and
5. A revised budget, using the NYSED budget template (see Appendix D).

**C. Changes in the school design and/or educational program that are inconsistent with those in the approved charter** must include the following:

1. A line-by-line “redlined” comparison of changes;
2. A brief narrative detailing whether the revision is expected to have any budgetary implications and if those implications will increase or decrease the school’s budget. If a budgetary change is anticipated, a revised budget using the NYSED budget template (see Appendix D) for each year through the end of the charter term must be included. If the charter term ends less than three years after the proposed revision

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<sup>5</sup> In the event that a revision requested does not fall into one of these enumerated categories, the CSO will determine what additional materials, if any, are needed from the school.

implementation date, the budget must include these additional years, i.e., three years after implementation; and

3. A revised staffing plan, including a summary of the roles and responsibilities for the school's administrative and leadership staff.

**D. Temporary or permanent relocation of the school to a new school district, or a new borough in New York City, must include the following:<sup>6 7 8</sup>**

1. A table identifying the current school facility(ies) (including the district or CSD of location), grades served at each location, the number of students served currently therein, and the maximum number of students who can be served at capacity for each year in the current charter term;<sup>9</sup>
2. A table identifying the proposed school facility(ies) (including the district or CSD of location), grades served at each location, the number of students served currently therein, and the maximum number of students who can be served at capacity, starting with the current year and continuing through the end of the charter term;
3. An analysis of the projected programmatic and fiscal impact of the charter school on the proposed new school district of location, and other public and nonpublic schools in the area (see Appendix E);
4. A copy of the proposed purchasing contract and/or lease agreement, along with a summary detailing the source of funds used for the purchase/lease including but not limited to public funds, new market tax credits, bonds, donations, and loans;
5. A rationale as to why this building purchase/lease is proposed as opposed to other properties and a market analysis showing that the purchase or lease terms are at or below market rate. Any extenuating circumstances regarding the proposed building should be included in the rationale;
6. Certificate of Occupancy and Fire Inspection (see [NYSED guidance regarding the Fire Inspection](#)) documents for the facility. For buildings where this is not yet available, the school should submit a detailed timeline as to when these required documents will be obtained which must be prior to occupancy of this building by staff or students;

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<sup>6</sup> Notice of the revision will be provided to the current school district and the proposed school district of location. Hearings will take place in both districts.

<sup>7</sup> Charter schools located in NYCDOE public school buildings must also coordinate with the New York City Department of Education on any proposal to expand within a current facility or relocate to another NYCDOE facility.

<sup>8</sup> Even after the relocation of the school has been approved, schools are not permitted to operate in a new facility until the CSO has provided a written statement granting "consent to open," which is only issued after a CSO inspection of the facility.

<sup>9</sup> See Appendix B



7. A revised budget for each year through the end of the charter term, using the NYSED budget template (see Appendix D). If the charter term ends less than three years after the proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation;
8. A transportation plan to ensure that existing and future students are able to get to the newly proposed location must be included; and
9. Evidence of engagement with parents/guardians of children enrolled in the school as well as the community in the new area of location.

**E. Contracting with [an entity that provides comprehensive management services](#) must include the following:<sup>10</sup>**

1. A copy of all proposed contracts with the entity that provides comprehensive management services (the contract requires separate CSO approval prior to final execution);
2. A copy of revised by-laws, which must include provisions required by Sections 2.13, 2.14, and Exhibit C of the Charter Agreement. Use the Track Changes feature in your word processing software to show the modified text (creating a red-lined version for CSO review). Please submit the entirety of the by-laws with your tracked changes, not a summation of revised text;
3. Evidence of a clearly defined, performance-based relationship between the school's board of trustees and proposed entity that provides comprehensive management services;
4. Evidence that the proposed entity that provides comprehensive management services is a not-for-profit entity;
5. Evidence that the proposed entity that provides comprehensive management services registered with the NY Department of State;
6. Evidence that a proposed entity that provides comprehensive management services has a demonstrated track record of positive academic results and responsible fiscal management; and
7. A revised budget for each year through the end of the charter term using the NYSED budget template (see Appendix D). If the charter term ends less than three years after the proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation.

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<sup>10</sup> Please refer to the NYSED [Definition of an Entity That Provides Comprehensive Management Services](#)

8. A letter from legal counsel retained by the Education Corporation stating that the Management Contract meets such counsel's approval. Such counsel shall not represent the Management Provider.

**F. Discontinuing a contract with an entity that provides comprehensive management services** must include the following:

1. A copy of any amended contracts or agreements with the entity that provides comprehensive management services (may require separate CSO approval);
2. A line-by-line "redlined" version of the revised by-laws;
3. Evidence that the school has the capacity to operate independently of the entity that provides comprehensive management services; and
4. A revised budget for each year through the end of the charter term, using the NYSED budget template (see Appendix D). If the charter term ends less than three years after the proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation.

**G. Changing the name of the school or education corporation** must include the following:<sup>11</sup>

1. The rationale for the proposed name change.

**H. Increases or decreases to the maximum enrollment and/or grade span<sup>12</sup>** must include the following:

1. The approved enrollment chart for the entire current charter term;<sup>13</sup>
2. A proposed enrollment chart for the entire current charter term;
3. Identification of the current location of the school and any plans to secure additional or new space to accommodate the increased enrollment or grades;
4. Evidence of the demand for additional seats and/or grades at the school;
5. A description of whether and how the increased enrollment and/or grade span would affect the distribution of students across grades in the school;

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<sup>11</sup> The proposed name must include the words "charter school" and shall not include the name or identification of a for-profit business or corporate entity.

<sup>12</sup> Board of Regents-Authorized charter schools are not permitted to exceed the approved maximum enrollment of the school and may not enroll less than 85% of the approved projected enrollment in a given year.

<sup>13</sup> See Appendix A

6. A plan for developing curriculum-related information for any new grades being proposed, consistent with what was required in the original application for the charter;
7. A revised budget for each year through the end of the charter term, using the NYSED budget template (see Appendix D). If the charter term ends less than three years after the proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation;<sup>14</sup>
8. An analysis of the projected programmatic and fiscal impact of the charter school on the proposed new school district of location, and other public and nonpublic schools in the area (see Appendix E);
9. A revised staffing plan, including a summary of the roles and responsibilities for the school's administrative and leadership staff, if applicable; and
10. If organizational changes are necessary to complement the revised staffing plan (e.g., new reporting positions or administrative positions) provide current and proposed organizational charts (with redlined changes) for review and approval.

**I. Adding or removing a Summer School Program** must include the following:

1. Evidence of demand or need for the program;
2. A description of whether the program will be optional or mandatory, how many students will participate in the program each year, and how those students will be selected;
3. A staffing plan for the program; and
4. A revised budget for each year through the end of the charter term, using the NYSED budget template (see Appendix D). If the charter term ends less than three years after the proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation;

**J. Merger/Consolidation of Education Corporation**

Please refer to the [Guidelines for Submitting an Application for Merger/Consolidation](#) for complete information.

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<sup>14</sup> The school's budget may not include student enrollment that exceeds what has been approved by the Board of Regents. However, to budget conservatively, the school may project enrollment that is no greater than 15% below authorized enrollment.

## K. Restructuring of the Education Corporation

Please refer to the [Guidelines on the Submission of Plans to Restructure an Existing Education Corporation/School At-Risk of Non-Renewal/Closure](#) for complete information.

### **Non-Material Revisions**

#### **Common Non-Material Revisions and the Additional Documents Required**

**A. Temporary or permanent relocation of the school within the same school district, or same borough in New York City, or acquisition of a new facility or building,** must include the following:<sup>1516</sup>

1. A table identifying the current school facility(ies) (including the district or CSD of location), grades served at each location, the number of students served currently therein, and the maximum number of students who can be served at capacity;<sup>17</sup>
2. A table identifying the proposed school facility(ies) (including the district or CSD of location), grades served at each location, the number of students served currently therein, and the maximum number of students who can be served at capacity, starting with the current year and continuing for at least five years;<sup>18</sup>
3. A copy of the proposed purchasing contract and/or lease agreement, along with a summary detailing the source of funds used for the purchase/lease including but not limited to public funds, new market tax credits, bonds, donations, and loans;
4. A rationale as to why this building purchase/lease is proposed as opposed to other properties and a market analysis showing that the purchase or lease terms are at or below market rate. Any extenuating circumstances regarding the proposed building should be included in the rationale;
5. Certificate of Occupancy and Fire Inspection (see [NYSED guidance regarding the Fire Inspection](#)) documents for the facility. For buildings where this is not yet available, the school should submit a detailed timeline as to when these required documents will be obtained which must be prior to occupancy of this building by staff or students;
6. A revised budget for each year through the end of the charter term, using the NYSED budget template (Appendix D). If the charter term ends less than three years after the

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<sup>15</sup> Charter schools located in NYCDOE public school buildings must also coordinate with the New York City Department of Education on any proposal to expand within a current facility or relocate to another NYCDOE facility.

<sup>16</sup> Even after the relocation of the school has been approved, schools are not permitted to operate in a new facility until the CSO has provided a written statement granting "consent to open," which is only issued after a CSO inspection of the facility.

<sup>17</sup> See Appendix B

<sup>18</sup> See Appendix B

proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation;

7. A transportation plan to ensure that existing and future students are able to get to the newly proposed location must be included; and
8. Evidence of engagement with parents/guardians of children enrolled in the school as well as the community in the new area of location.

**B. Changes or corrections to the school's key design elements, mission or vision statement that *do not* fundamentally alter a school's key design elements, mission, vision, or educational philosophy<sup>19</sup> must include the following:**

1. A line-by-line "redline" comparison of changes. Use the Track Changes feature in your word processing software to show the modified text (creating a red-lined version for CSO review). Please submit actual pages with your tracked changes, not a summation of revised text. This can be limited to the relevant sections of any lengthy documents (over 30 pages, like the charter), but should then include the entirety of those sections.

**C. Minor corrections/clarifications to the school's organizational structure must include the following:**

1. A summary of changes to organizational/leadership structure, if applicable;
2. The current organizational chart, if applicable;
3. The proposed organizational chart, highlighting any changes, if applicable; and
4. A brief narrative detailing whether the revision is expected to increase or decrease the school's budget. If a budgetary change is anticipated, a revised budget for each year through the end of the charter term must be included, using the NYSED budget template (see Appendix D). If the charter term ends less than three years after the proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation.

**D. Changes in the school's by-laws, code of conduct, discipline policy, personnel policy, complaint policy, student/family handbook, promotion policy, or teacher/staff handbook must include the following:**

1. A line-by-line "redlined" comparison of changes.

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<sup>19</sup> This includes adding a CTE program. The CSO will only approve CTE program revisions if the school can demonstrate that it has consulted with the [NYSED Career and Technical Education Team](http://www.nysed.gov/career-technical-education/cte-policy-and-guidance), and has met the requirements of that team in accordance with the guidelines located at <http://www.nysed.gov/career-technical-education/cte-policy-and-guidance>.

**E. Changes in the school's admissions policy or enrollment process** must include the following:

1. A line-by-line "redlined" comparison of changes; and
2. A redlined version of the school's enrollment application, which must align with the revised policy.

Please note: Charter schools that wish to increase the chances of at-risk students obtaining an enrollment offer at their school should first consider their enrollment efforts. Authentic community-based outreach efforts that foster direct connections between prospective parents and the schools have been shown to be the most effective for schools across the state. If these do not yield satisfactory results, the school may want to consider a weighted lottery. In the revision request, the school should specify the specific methodology by which the weighting will be determined each year. This should include the timeframe that, for the purposes of transparency, sets the weight being applied each year no later than 30 days prior to the lottery deadline. The specific weight applied each year does not need to be included in the non-material revision request if the methodology for determining the weight each year is included. The school will need to request a new non-material revision regarding lottery weighting only if the methodology by which the weighting is determined each year changes.

Charter schools receiving CSP funds that choose to employ lottery weighting are required by the conditions of NYSED's grant agreement with the USDOE to use the NYSED Weighted Lottery Generator found at <http://www.nysed.gov/charter-schools/policies-procedures-resources-all-charter-schools>. Schools not receiving CSP funds should devise their own weighted lottery methodology for approval by the CSO.

In addition to utilizing a weighted lottery, schools that have a specific school design that targets a particular population can request approval to employ a lottery preference. Schools that do not have a specific school design, but that wish to add one to utilize a lottery preference instead of a weighted lottery, must submit a material school design revision request (see item C on page 8) by the December 1<sup>st</sup> deadline, along with the non-material enrollment policy revision. Please keep in mind that material revisions to add a specific school design targeting a particular population must include a detailed explanation of how the proposed change has been *interwoven throughout the charter* so that it is a fundamental change for the school. For example, a key design change to serve economically disadvantaged students might include all of the following: free services and amenities for students in the budget, daily counseling and supports, family educational opportunities and resources, professional development to staff regarding the impact of poverty on learning, and partnership with community-based organizations.

**Note:** Revision requests to change a school’s admissions policy or enrollment processes must be submitted no later than December 1st, in the year that the lottery will be held. The school must have ample time to finalize the approved revisions to the policy and application, and provide notice to the public regarding the changes, after CSO review and approval.

**F. Minor changes in the school’s schedule that are consistent with the charter** must include the following:

1. A line-by-line “redlined” comparison of changes.

**G. Adding a board member to an existing charter school.**

Please refer to the guidance for adding members to the board of trustees posted on the CSO website at: <http://www.nysed.gov/charter-schools/add-board-member>

The CSO portal for adding members to the board of trustees is located at:

[https://nysed-cso.smapply.io/prog/add\\_a\\_board\\_member/](https://nysed-cso.smapply.io/prog/add_a_board_member/)

**H. Requesting a Planning Year (New Schools Only).**

Charter schools are strongly encouraged to submit planning year requests as soon as possible. Ideally, all planning year requests should be submitted to the Charter School Office no later than July 15<sup>th</sup> of the year in which the school has been approved to open. For example, if a school is scheduled to open in September 2026, the planning year request must be submitted to the CSO no later than July 15, 2026.

In the rare instance that extenuating circumstances preclude the submission of a proposed charter revision by July 15<sup>th</sup> (e.g., severe facilities damage from fire or flood, an extremely low applicant pool despite substantial recruitment efforts), the school should promptly contact its CSO liaison to discuss the need for the planning year.

Documentation submitted must include the following:

1. A date certain for opening, including a timeline detailing the planning activities to be conducted during each month of the planning year;<sup>20</sup>
2. An updated and revised budget and month-to-month cash flow projections for the pre-opening period, using the NYSED budget template (see Appendix D). The budget must ensure start-up funds are sufficient to support the school until the first per-pupil payment arrives;

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<sup>20</sup> The December 1<sup>st</sup> deadline for the submission of charter school revisions will be excused in cases where the school is requesting a planning year. The NYSED CSO Revision Guidelines are available at: <http://www.nysed.gov/charter-schools/oversight-plan-board-regents-authorized-charter-schools>.

3. Written confirmation signed by the chair of the board of trustees, stating that the school will maintain all pre-opening activities, as set forth in **Appendix C**;
4. Written notice to school applicants and staff regarding the pending request for a planning year. The notice must explain the school's plans in the event that the request is granted, and in the event the request is denied. The applicant must also post the notice on the admissions/enrollment page of the school's website, and provide a link to the same; and
5. Any other information that the school deems relevant to the proposed request and any additional information that the CSO may require.

Planning year approvals will not be unreasonably withheld. However, the request for a planning year may be denied if:

1. It does not sufficiently demonstrate the need for a planning year;
2. It is submitted close to the scheduled start of the school year and there are no exigent circumstances warranting a planning year;
3. Two or more planning years have already been granted;<sup>21</sup> or
4. If the nature of the request, or the circumstances under which the request is made suggests a lack of organizational knowledge and/or capacity to effectively open, maintain, and oversee a high-quality charter school.

**I. Other changes to the school's charter<sup>22</sup> must include the following:**

1. A summary of the changes;
2. A brief narrative detailing whether the revision is expected to increase or decrease the school's budget. If a budgetary change is anticipated, a revised budget for each year through the end of the charter term must be included, using the NYSED budget template (see Appendix D). If the charter term ends less than three years after the proposed revision implementation date, the budget must include these additional years, i.e., three years after implementation;
3. A staffing plan for implementation of the proposed change; and
4. Any other information that the school deems relevant to the proposed request and any

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<sup>21</sup> In very limited circumstances, NYSED may grant a third and final planning year. If the school is requesting a third and final planning year, the school must submit the Assurance in Appendix C2 instead of the Assurance in Appendix C.

<sup>22</sup> This includes instituting a temporary summer school program lasting not more than one summer.



additional information that the CSO may require.

### **Other Changes Not Considered Revisions**

Charter schools should always work with the school's CSO liaison to determine which revision type a proposed change falls under or if it is considered a revision at all. There are several changes that do not constitute charter revisions, either material or non-material (including some enrollment changes<sup>23</sup>) but which should still prompt a conversation with the school's CSO liaison. Your CSO liaison is a resource that schools should utilize when making the determination of whether or not a change is a revision, and whether or not that revision is material or non-material.

### **What to Expect After Submission**

The CSO, the NYSED Commissioner, and the Board of Regents, where applicable, will consider all relevant information when evaluating a proposed charter revision, including but not limited to: evidence of the success of the school's academic program, viability of the school as an organization, faithfulness of the school to the terms of its charter, capacity of the school to successfully implement the proposed charter revision, and the parent/guardian and community engagement conducted along with any feedback received.

To the extent that the proposed charter revision request provides clear and complete information that addresses the requirements enumerated in this guidance document, the evaluation of a charter revision request will be facilitated and expedited, if possible. The need to request additional information from the school and/or clarify information that has been submitted may occur and could result in prolonging the approval process.

For material charter revisions, the CSO compiles the relevant information on behalf of the Department. The CSO will make a decision on whether or not to recommend the proposed material revision to the Board of Regents and the Board of Regents will make a final decision on whether or not to approve the recommendation. Decisions on non-material revisions are made solely by the CSO.

The Charter Schools Act does not specify a deadline by which the CSO and/or the Board of Regents must consider and/or make a decision regarding a proposed charter revision. However, every effort will be made to provide schools with timely decisions. Ongoing and proactive communication with the school's CSO liaison is critical. Material revisions, which require the approval of the Board of Regents, are only considered by the Regents at its regularly scheduled

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<sup>23</sup> Schools may go below their authorized enrollment for a given year without CSO or Regents approval, as long as they do not fall below 85% of the authorized enrollment for that year. Keep in mind that a school cannot exceed its authorized enrollment, cannot go below 85% of its authorized enrollment for a particular year, and cannot make any changes to the grades served without prior written approval.

monthly meetings, a schedule of which can be found at <https://www.regents.nysed.gov/meetings/dates>. The CSO will communicate with the school when a decision has been made about a proposed charter revision.

**PLEASE NOTE**  
**ANY PROPOSED REVISIONS OR PORTIONS THEREOF**  
**THAT ARE NOT SPECIFICALLY APPROVED ARE DEEMED DENIED.**

**Common Reasons Revisions Are Denied**

1. The school has mixed or poor academic results, or little to no academic data at the time of the request to support the proposed revision.<sup>24</sup>
2. The material revision request is submitted after the December 1<sup>st</sup> deadline, and there are no exigent circumstances warranting an extension of time.
3. The request does not include all required information (e.g., justification, board meeting minutes, board resolution, enrollment charts, NYSED budget template, etc).
4. Documents submitted did not include redlined changes.
5. The school fails to enroll and retain students with disabilities, English language learners, and economically disadvantaged students, in percentages comparable to the district of location, and fails to engage in extensive efforts to recruit and retain such students.<sup>25</sup>
6. The request violates the law, regulations, or CSO policy (e.g., adding a board member employed by the school in violation of the General Municipal Law; adding preferences for student subgroups without a specific school design pursuant to Commissioner's Regulation §119.5).
7. Material changes to the school's key design, mission, vision, or educational philosophy are not interwoven throughout the charter and/or do not reflect innovative ways of serving the school community. For example, a key design change to serve economically disadvantaged students might include all of the following: free services and amenities for students in the budget, daily counseling and supports, family educational opportunities and resources, professional development to staff regarding the impact of poverty on learning, and partnership with community-based organizations.

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<sup>24</sup> Refer to the [Charter School Performance Framework](#) for a delineation of minimum academic performance standards expected of all Regents-authorized schools.

<sup>25</sup> If the school is requesting an enrollment increase or grade expansion, this concern may be addressed by demonstrating the school will couple the admission of additional students with a policy of providing weighting or preferencing to student subgroups. In this case, a redlined version of the revised enrollment policy must be submitted for review and approval.

8. The school has submitted multiple revisions at different points in the academic year. To the greatest extent possible, charter revisions should be submitted simultaneously as separate submissions within the NYSED CSO Portal, in order to best streamline the process. Please note, the [NYSED Application for Charter Renewal](#) and the [Guidelines for Submitting an Application for Merger/Consolidation](#) both contain sections for revision requests. Schools are strongly encouraged to submit revision requests during renewal and/or merger or consolidation, and to limit revisions submitted during the course of the charter term.
9. The school is in its initial charter term, and requests revisions that would substantially alter the educational design or enrollment plan.
10. The school fails to conduct sufficient community and family engagement regarding the proposed revision.

### **Revision Best Practices**

1. Contact your CSO liaison to discuss the revision request. Please see the “Submitting a Revision Request” section in this document.
2. Be sure that all documents that require a signature have been signed, and that any documents required to be on school letterhead are provided in that format.
3. Be sure to provide only the finalized, approved board minutes, not draft minutes. If you have only draft minutes, wait until you have finalized minutes before submitting the request.
4. The required board resolution document must be separate and apart from the minutes or any other documents submitted with the revision request.
5. Be sure to include all documents required in the revision guidelines. If a particular item does not apply, include a document explaining why it does not apply to your request.
6. Be sure that all board members have received CSO approval.
7. Pay attention to detail. For example, if a monthly tally of hours and instructional days is requested for the calendar, be sure to include that.
8. Proofread and check submitted documents for errors before submitting.
9. Be sure to solicit school community feedback, in some way, for all revisions. Information about the community feedback received will be required as part of your portal submission.

10. Property-related requests must include a preliminary purchase agreement, lease agreement, contract of sale, or similar document.
11. If the lease is with the school's "Friends of" organization, explain why, the benefit(s) to the school, and how the arrangement will work logistically.
12. If you are submitting an organization chart as part of your revision, be sure to include new staff titles and position descriptions, as necessary. Also keep in mind that the proposed change cannot be implemented prior to approval by the CSO.
13. Submit the revision well enough in advance to get an approval decision before you need to implement.

**FOR ADDITIONAL RESOURCES, PLEASE CONTACT YOUR CSO LIAISON**  
**OR EMAIL [CHARTERSCHOOLS@NYSED.GOV](mailto:CHARTERSCHOOLS@NYSED.GOV).**

## **Appendix A: Sample Enrollment/Grade Revision Charts**<sup>26</sup>

**Table 1: Sample Charter School  
Approved Enrollment/Grade Configuration**

	20XX-20XX	20XX-20XX	20XX-20XX	20XX-20XX	20XX-20XX
<b>Grade Configuration</b>	K-Grade 3	K-Grade 4	K-Grade 5	K-Grade 5	K-Grade 5
<b>Total Approved Enrollment</b>	100	200	300	300	300

**Table 2: Sample Charter School  
Proposed Enrollment/Grade Configuration**

	20XX-20XX	20XX-20XX	20XX-20XX	20XX-20XX	20XX-20XX
<b>Grade Configuration</b>	K-Grade 3	K-Grade 4	K-Grade 5	K-Grade 5	K-Grade 5
<b>Total Proposed Enrollment</b>	100	200	300	400	500

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<sup>26</sup> List grade and enrollment configurations for each year in the current charter term, even if those years have passed.

## **Appendix B: Sample Facilities Table<sup>27</sup>**

**Table 1: Sample Current Facilities Table**

20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				

**Table 2: Sample Proposed Facilities Table<sup>28</sup>**

20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				
20XX - 20XX	Address	School District /CSD	Grade Levels	Enrollment
1.				
2.				

<sup>27</sup> List facility information for each year in the current charter term, even if those years have passed.

<sup>28</sup> List proposed facility information for at least five years, beginning with the current year.

## Appendix C: Planning Year Statement of Assurance

I, \_\_\_\_\_ (Print Name of the Chair of the Board of Trustees) am the Chair of the \_\_\_\_\_ (Print Charter School Name) Board of Trustees. In the event that the school's \_\_\_\_\_ (date) request for a planning year **for the 20\_\_ - 20\_\_ academic year** is granted, the charter school's Board of Trustees will continue to engage in all pre-opening activities, including but not limited to:

1. Monthly board of trustee meetings in accordance with the Open Meetings Law;
2. Continued participation in all NYSED CSO pre-opening conference calls;
3. All required fiduciary responsibilities, included but not limited to audits; and
4. Any other activities required by the pre-opening checklist and the New York State Education Department.

In the event that the planning year request is denied, the school will open in 20\_\_ - 20\_\_, in accordance with the originally approved timeline. If the school will not open as required, the Board will formally and immediately surrender the charter.

\_\_\_\_\_, Board Chair  
of \_\_\_\_\_ Charter School

STATE OF \_\_\_\_\_ )  
: ss.:  
COUNTY OF \_\_\_\_\_ )

On the \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, the undersigned, a Notary Public in and for said state, personally appeared \_\_\_\_\_, personally known to me or proved to me on the basis of satisfactory evidence to be the individual whose name is subscribed to the within **Planning Year Statement of Assurance** and acknowledged to me that s/he executed the same in his/her capacity, and that by his/her signature on the instrument, the individual, or the person upon behalf of which the individual acted, executed the instrument.

\_\_\_\_\_  
Notary Public - State of \_\_\_\_\_

## Appendix C2: Final Planning Year Statement of Assurance

I, \_\_\_\_\_ (Print Name of the Chair of the Board of Trustees) am the Chair of the \_\_\_\_\_ (Print Charter School Name) Board of Trustees. In the event that the school's \_\_\_\_\_ (date) request for a **third and final** planning year **for the 20\_\_ - 20\_\_ academic year** is granted, the charter school's Board of Trustees will continue to engage in all pre-opening activities, including but not limited to:

1. Monthly board of trustee meetings in accordance with the Open Meetings Law;
2. Continued participation in all NYSED CSO pre-opening conference calls;
3. All required fiduciary responsibilities, included but not limited to audits; and
4. Any other activities required by the pre-opening checklist and the New York State Education Department.

The board further understands and agrees that in the event that the final planning year request is granted, if the school does not open in the 20\_\_ - 20\_\_ academic year, whether due to an event outside of the board's control, failure to satisfactorily complete NYSED pre-opening requirements, or for any other reason, NYSED will not grant any additional planning years. If the school will not open in the 20\_\_ - 20\_\_ academic year as required, regardless of the reason, the Board will formally and immediately surrender the charter.

The board also understands and agrees that in the event that the final planning year request for 20\_\_ to 20\_\_ is *denied*, the school will open in 20\_\_ - 20\_\_, in accordance with the originally approved timeline. If the school will not open as required, the Board will formally and immediately surrender the charter.

\_\_\_\_\_, Board Chair  
of \_\_\_\_\_ Charter School

STATE OF \_\_\_\_\_ )  
: ss.:  
COUNTY OF \_\_\_\_\_ )

On the \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, the undersigned, a Notary Public in and for said state, personally appeared \_\_\_\_\_, personally known to me or proved to me on the basis of satisfactory evidence to be the individual whose name is subscribed to the within **Planning Year Statement of Assurance** and acknowledged to me that s/he executed the same in his/her capacity, and that by his/her signature on the instrument, the individual, or the person upon behalf of which the individual acted, executed the instrument.

\_\_\_\_\_  
Notary Public - State of \_\_\_\_\_



Appendix D: NYSED Budget Template

<div>Charter School Name Here</div> <div>Contact Name:</div> <div>Contact Email:</div> <div>Contact Phone:</div> <div>Charter Term: (Example) July 1, 20XX to June 30, 20XX</div>						<div>DESCRIPTION OF ASSUMPTIONS</div> <div>Note: The completion of this section is mandatory.</div> <div>Please reference section/page number in application if applicable. For example, student enrollment would reference the page in the application that states enrollment targets.</div>				
PROJECTED BUDGET FOR CHARTER PERIOD										
Total Revenue	-	-	-	-	-					
Total Expenses	-	-	-	-	-					
Net Income (Before Cash Flow Adjustments)						-	-	-	-	-
Actual Student Enrollment <sup>29</sup>						-	-	-	-	-
Total Paid Student Enrollment						-	-	-	-	-
						Year 1 20XX-20XX	Year 2 20XX-20XX	Year 3 20XX-20XX	Year 4 20XX-20XX	Year 5 20XX-20XX
Note: Please insert additional detail lines as appropriate.										
REVENUE						Per Pupil Revenue Percentage Increase				
REVENUES FROM STATE SOURCES						0.0%	0.0%	0.0%	0.0%	0.0%
Per Pupil Revenue:						<a href="https://stateaid.nysed.gov/charter/">https://stateaid.nysed.gov/charter/</a>				
School District 1 (Enter Name)						-	-	-	-	-
School District 2 (Enter Name)						-	-	-	-	-
School District 3 (Enter Name)						-	-	-	-	-
School District 4 (Enter Name)						-	-	-	-	-
School District 5 (Enter Name)						-	-	-	-	-
School District 6 (Enter Name)						-	-	-	-	-
School District - ALL OTHER						-	-	-	-	-
TOTAL Per Pupil Revenue (Average Districts Per Pupil Funding)						-	-	-	-	-

<sup>29</sup> The school’s budget may not include student enrollment that exceeds what has been approved by the Board of Regents. However, to budget conservatively, the school may project enrollment that is no greater than 15% below authorized enrollment.

Special Education Revenue			-	-	-	-	-
Grants							
Other			<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>
TOTAL REVENUE FROM STATE SOURCES			-	-	-	-	-
REVENUE FROM FEDERAL FUNDING							
IDEA Special Needs			-	-	-	-	-
Title I			-	-	-	-	-
Title Funding - Other			-	-	-	-	-
School Food Service (Free Lunch)			-	-	-	-	-
Grants							
TOTAL REVENUE FROM FEDERAL SOURCES			-	-	-	-	-
LOCAL and OTHER REVENUE							
Contributions and Donations			-	-	-	-	-
Fundraising			-	-	-	-	-
Erate Reimbursement			-	-	-	-	-
Earnings on Investments			-	-	-	-	-
Interest Income			-	-	-	-	-
Food Service (Income from meals)			-	-	-	-	-
Text Book			-	-	-	-	-
OTHER			<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>
TOTAL REVENUE FROM LOCAL and OTHER SOURCES			-	-	-	-	-
TOTAL REVENUE			<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>
EXPENSES							
ADMINISTRATIVE STAFF PERSONNEL COSTS							
Executive Management			No. of Positions				
			-	-	-	-	-
Instructional Management			-	-	-	-	-

Deans, Directors & Coordinators	-	-	-	-	-	-
CFO / Director of Finance	-	-	-	-	-	-
Operation / Business Manager	-	-	-	-	-	-
Administrative Staff	-	-	-	-	-	-
TOTAL ADMINISTRATIVE STAFF	-	-	-	-	-	-
<b>INSTRUCTIONAL PERSONNEL COSTS</b>						
Teachers - Regular	-	-	-	-	-	-
Teachers - SPED	-	-	-	-	-	-
Substitute Teachers	-	-	-	-	-	-
Teaching Assistants	-	-	-	-	-	-
Specialty Teachers	-	-	-	-	-	-
Aides	-	-	-	-	-	-
Therapists & Counselors	-	-	-	-	-	-
Other	-	-	-	-	-	-
TOTAL INSTRUCTIONAL	-	-	-	-	-	-
<b>NON-INSTRUCTIONAL PERSONNEL COSTS</b>						
Nurse	-	-	-	-	-	-
Librarian	-	-	-	-	-	-
Custodian	-	-	-	-	-	-
Security	-	-	-	-	-	-
Other	-	-	-	-	-	-
TOTAL NON-INSTRUCTIONAL	-	-	-	-	-	-
<b>SUBTOTAL PERSONNEL SERVICE COSTS</b>	-	-	-	-	-	-
<b>PAYROLL TAXES AND BENEFITS</b>						
Payroll Taxes	-	-	-	-	-	-

Fringe / Employee Benefits  
 Retirement / Pension  
**TOTAL PAYROLL TAXES AND BENEFITS**

-	-	-	-	-
-	-	-	-	-
-	-	-	-	-

**TOTAL PERSONNEL SERVICE COSTS**

-	-	-	-	-
---	---	---	---	---

**CONTRACTED SERVICES**

Accounting / Audit  
 Legal  
 Management Company Fee  
 Nurse Services  
 Food Service / School Lunch  
 Payroll Services  
 Special Ed Services  
 Titlement Services (i.e. Title I)  
 Related service provider costs not reimbursed by the district of residence  
 Other Purchased / Professional / Consulting  
**TOTAL CONTRACTED SERVICES**

-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-

**SCHOOL OPERATIONS**

Board Expenses  
 Classroom / Teaching Supplies & Materials  
 Special Ed Supplies & Materials  
 Textbooks / Workbooks  
 Supplies & Materials other  
 Equipment / Furniture  
 Telephone  
 Technology

-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-

Student Testing & Assessment

Field Trips

Transportation (student)

Student Services - other

Office Expense

Staff Development

Staff Recruitment

Student Recruitment / Marketing

School Meals / Lunch

Travel (Staff)

Fundraising

Other

**TOTAL SCHOOL OPERATIONS**

## FACILITY OPERATION & MAINTENANCE

Insurance

Janitorial

Building and Land Rent / Lease

Repairs & Maintenance

Equipment / Furniture

Security

Utilities

**TOTAL FACILITY OPERATION & MAINTENANCE**

## DEPRECIATION & AMORTIZATION

Insert Detail as Applicable

[illegible][illegible]

-	-	-	-	-
-	-	-	-	-
-	-	-	-	-

TOTAL DEPRECIATION AND AMORTIZATION	-	-	-	-	-
*****TOTAL FUNDS IN DISSOLUTION ESCROW & RESERVES / CONTIGENCY	-	-	-	-	-
TOTAL EXPENSES	-	-	-	-	-
NET INCOME	-	-	-	-	-

Note: Schools currently in their initial charter term must maintain an escrow account of \$100,000 by year 4. Schools renewed after 2019-2020 must add \$25,000 to their existing \$75,000 escrow account by December 31st of YR 2. NYSED may request most recent bank statements to support this entry.

ENROLLMENT - *School Districts Are Linked To Above Entries*					
	School District 1 (Enter Name)	-	-	-	-
	School District 2 (Enter Name)	-	-	-	-
	School District 3 (Enter Name)	-	-	-	-
	School District 4 (Enter Name)	-	-	-	-
	School District 5 (Enter Name)	-	-	-	-
	School District 6 (Enter Name)	-	-	-	-
	School District - ALL OTHER	-	-	-	-
TOTAL ENROLLMENT		-	-	-	-
REVENUE PER PUPIL		-	-	-	-
EXPENSES PER PUPIL		-	-	-	-

CASH FLOW ADJUSTMENTS					
OPERATING ACTIVITIES					
	Example - Add Back Depreciation	-	-	-	-
	Other	-	-	-	-
	Total Operating Activities	-	-	-	-
INVESTMENT ACTIVITIES					

Example - Subtract Property and Equipment Expenditures		-	-	-	-	-
Other		-	-	-	-	-
Total Investment Activities		-	-	-	-	-
FINANCING ACTIVITIES						
Example - Add Expected Proceeds from a Loan or Line of Credit		-	-	-	-	-
Other		-	-	-	-	-
Total Financing Activities		-	-	-	-	-
Total Cash Flow Adjustments		-	-	-	-	-
NET INCOME		-	-	-	-	-
Beginning Cash Balance		-	-	-	-	-
ENDING CASH BALANCE		-	-	-	-	-

## Appendix E: Fiscal Impact Table

Please complete the table below. Charter schools in NYC should use the entire NYCDOE to gauge fiscal impact. *Please footnote your sources and assumptions.*

**Projected Fiscal Impact upon District of Location**

Year	Number of Enrolled Students	Charter School Basic Per Pupil Tuition Rate	Total Charter School Per Pupil Cost to District	Estimated Additional Costs to District (e.g. SPED or Transportation Funds)	Total Projected Funding from District	Total District General Fund Budget	Projected Impact on District Budget
Notes:	Your Enrollment from the District	Found at the 4th column at <a href="https://stateaid.nysed.gov/charter/html_docs/charter_1920_rates.htm">https://stateaid.nysed.gov/charter/html_docs/charter_1920_rates.htm</a>	Column B multiplied by Column C minus any additional aid received by the district from the state as enumerated in the last (6 <sup>th</sup> ) column at <a href="https://stateaid.nysed.gov/charter/html_docs/charter_1920_rates.htm">https://stateaid.nysed.gov/charter/html_docs/charter_1920_rates.htm</a> multiplied by the students from the district.	This amount can be found in the "Calculation of Public Excess Cost Aid Attributable to Parentally-Placed Nonresident and Charter School Students" excel tables found at the bottom of the page at <a href="https://stateaid.nysed.gov/charter/">https://stateaid.nysed.gov/charter/</a> or you can use the total special education funding amount that you received from the district this past academic year.	This would be Column D plus Column E	This can be found on the school district's website	This would be Column F divided column G
20XX-20XX							
20XX-20XX							
20XX-20XX							
20XX-20XX							
20XX-20XX							