

Year 0 Guidebook

New Schools



2019-2020

Contents

GUIDEBOOK OVERVIEW5
 INTRODUCTION5
 YEAR 0 TEAM5
CHAPTER 1: ACCOUNTABILITY7
 CONDITIONS & MILESTONES7
 PCARS7
CHAPTER 2: CONTRACTING9
 PROCESS & TIMELINE10
CHAPTER 3: TECHNICAL ASSISTANCE11
 MONTHLY CHECK-INS11
 PEER-TO-PEER LEARNING OPPORTUNITIES11
 SITE VISITS11
 PROJECT MANAGEMENT TOOLS13
 ORIENTATION14
 WEBSITE CALENDAR14
 MONTHLY SCHOOL NEWSLETTERS14
 QUARTERLY SCHOOL BOARD NEWSLETTERS14
CHAPTER 4: CSI STAFF16
CHAPTER 5: GOVERNING BOARDS18
 Key Year 0 Activities for Boards19
CHAPTER 6: ASSESSMENT PLANNING20
 Key Year 0 Activities for Assessment21
CHAPTER 7: FACILITIES & FINANCE21
 FINANCIAL ACCREDITATION REQUIREMENTS21
 FINANCIAL TRANSPARENCY ACT21
 BUDGET DEVELOPMENT21
 BANKING22
 COLORADO CHARTER SCHOOLS PROGRAM GRANT23

CSI ASSISTANCE FUND	24
ONLINE FINANCIAL RESOURCES	24
Key Year 0 Activities for Finance and Facilities	25
CHAPTER 8: DATA SUBMISSIONS PLANNING	25
Data Management Systems	26
Data to Collect on Student Registration Forms.....	27
New Staff Paperwork.....	29
Request Student and Staff IDs	30
Contacts and Resources	30
Key Year 0 Activities for Data Submissions	31
CHAPTER 9: SPECIAL POPULATIONS.....	32
Special Education.....	32
Funding	32
Special Education Staffing.....	33
Exceptional Student Coordinator	33
Special Education Staffing Ratio Recommendations	33
Year 0 Activities for Special Education.....	34
GIFTED & TALENTED	34
Funding	35
Universal Screening Grant	35
Year 0 Activities for Gifted Education	35
SECTION 504.....	35
Section 504 Coordinator:	36
Year 0 Activities for Section 504.....	36
ENGLISH LANGUAGE LEARNERS.....	36
Funding	37
Year 0 Activities for ELL	37
CHAPTER 10: PRESCHOOL & CPP.....	38
Preschool Development	38
Colorado Preschool Program	38
CHAPTER 11: SCHOOL NURSING & HEALTH SERVICES	39
Year 0 Activities	39
CHAPTER 12: CTE, CONCURRENT ENROLLMENT & ASCENT PROGRAMS.....	40
CAREER & TECHNICAL EDUCATION (CTE) PROGRAMS.....	40
Eligible Schools	40

Developing a CTE Program.....	40
CONCURRENT ENROLLMENT & ASCENT PROGRAMS	41
Funding	41
Year 0 Activities	41
CHAPTER 13: OTHER RESOURCES.....	43

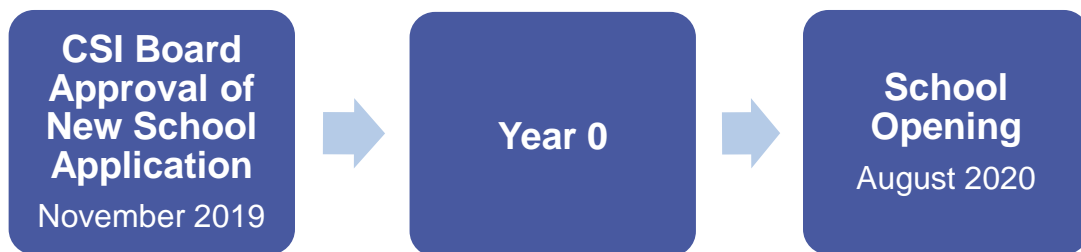
GUIDEBOOK OVERVIEW

This guidebook is designed to support newly approved CSI charter schools in their Year 0 planning in order to ensure school founders have the resources and tools they need to start strong and lay a solid foundation for future success. This resource will provide information and guidance on:

- Year 0 Accountability
- Contracting Process
- Year 0 Technical Assistance
- Year 0 Resources
- The CSI Team

Although this guidebook is an attempt to be comprehensive, it does not contain all available information for Year Zero schools and should not be considered legal authority or advice. This guidebook will be updated annually. Year Zero schools are encouraged to contact Clare Vickland, Director of Student Services for details about the information referenced throughout this document.

INTRODUCTION



Year Zero begins when a new school’s charter application is approved by the CSI Board of Directors and lasts until the school opens its doors for students on the first day of school. The primary goal of Year 0 is to establish and execute a plan for a successful school opening. This planning year focuses on taking the proposal for the school outlined in the application and transforming it into a school that is ready to serve students on day one. Throughout Year 0, the founding team will be asked to meet the conditions and milestones outlined in the application resolution. Founding teams will communicate regularly (monthly phone calls, site visits, etc.) with CSI’s Director of Student Services to ensure the team is making progress towards school opening readiness tasks.

YEAR 0 TEAM

Anastasia Hawkins, Director of Policy & Legal Initiatives

The Director of Policy & Legal Initiatives monitors the organizational performance of CSI schools to ensure compliance with applicable laws, regulations, contract provisions and policies, as well as tracks local and national legal and policy developments in order to better support CSI schools. She has experience overseeing compliance for a large network of charter schools throughout the United States.

Clare Vickland, Director of Student Services

Clare oversees accountability, training, and technical assistance for all state and federal programs, in addition to coordinating the onboarding process for new CSI schools and new leaders to CSI schools. She has experience in Special Education, At-risk student populations, Curriculum & Instruction, and School Leadership in charter schools.

CSI Leadership Consultant

CSI contracts with an experienced charter school leader who acts as an outside consultant to support new and existing schools in the areas of governance and leadership.

CHAPTER 1: ACCOUNTABILITY

CONDITIONS & MILESTONES

Upon approval of the charter school, the CSI Staff and Board may establish a set of conditions and/or milestones to address any risks identified from the charter application that the founding team must fulfill over the subsequent months. Submissions to fulfill conditions and milestones should be submitted by the applicant team to the Director of Legal and Policy Initiatives on or before the assigned due date.

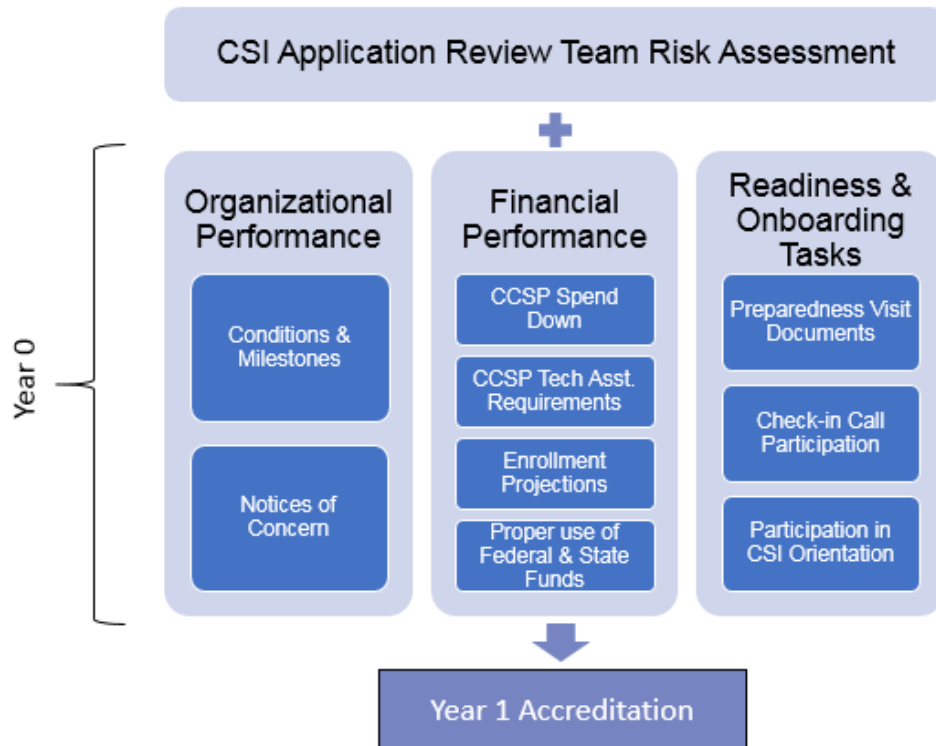
Conditions must be satisfied by the proposed school prior to entering into a contract with CSI. Each condition submitted will be reviewed by CSI staff and deemed complete, partially complete, or incomplete. If the proposed school does not satisfy the conditions set forth, the Board may deny the application.

Milestones are requirements that must be met by the applicant once any conditions are satisfied, the application is fully approved, and the applicant has entered into a contract with CSI. Conditions and milestones are generally set by CSI Board resolution at the time of conditional application approval or application approval. Conditions and milestones may be revised by CSI Staff and the CSI Board when appropriate.

PCARS

The Pre-Opening CSI Review of Schools (PCARS) is a system to evaluate a school's performance in Year 0 and ultimately leads to the determination of a school's Year 1 accreditation rating. The PCARS evaluation system provides evaluative information about a school's performance prior to the availability of academic assessment data. PCARS evaluates a school's risk assessment as determined by the CSI Application Review Team, as well as a body of evidence from Year 0 including Organizational Performance, Financial Performance, and Readiness and Onboarding task Performance.

CSI is committed to authorizing high-quality charter schools, therefore the default accreditation rating given to Year 1 schools is a Performance rating. This accreditation rating may be lowered based on the body of evidence collected during Year 0. The severity and quantity of concerns identified in Year 0 will determine the school's Year 1 accreditation rating. In subsequent years, ratings are determined through the CARS accreditation system, which builds upon the state's lens of evaluation and includes additional indicators within the CSI Performance Frameworks in Academics, Finance, and Organization.



CHAPTER 2: CONTRACTING

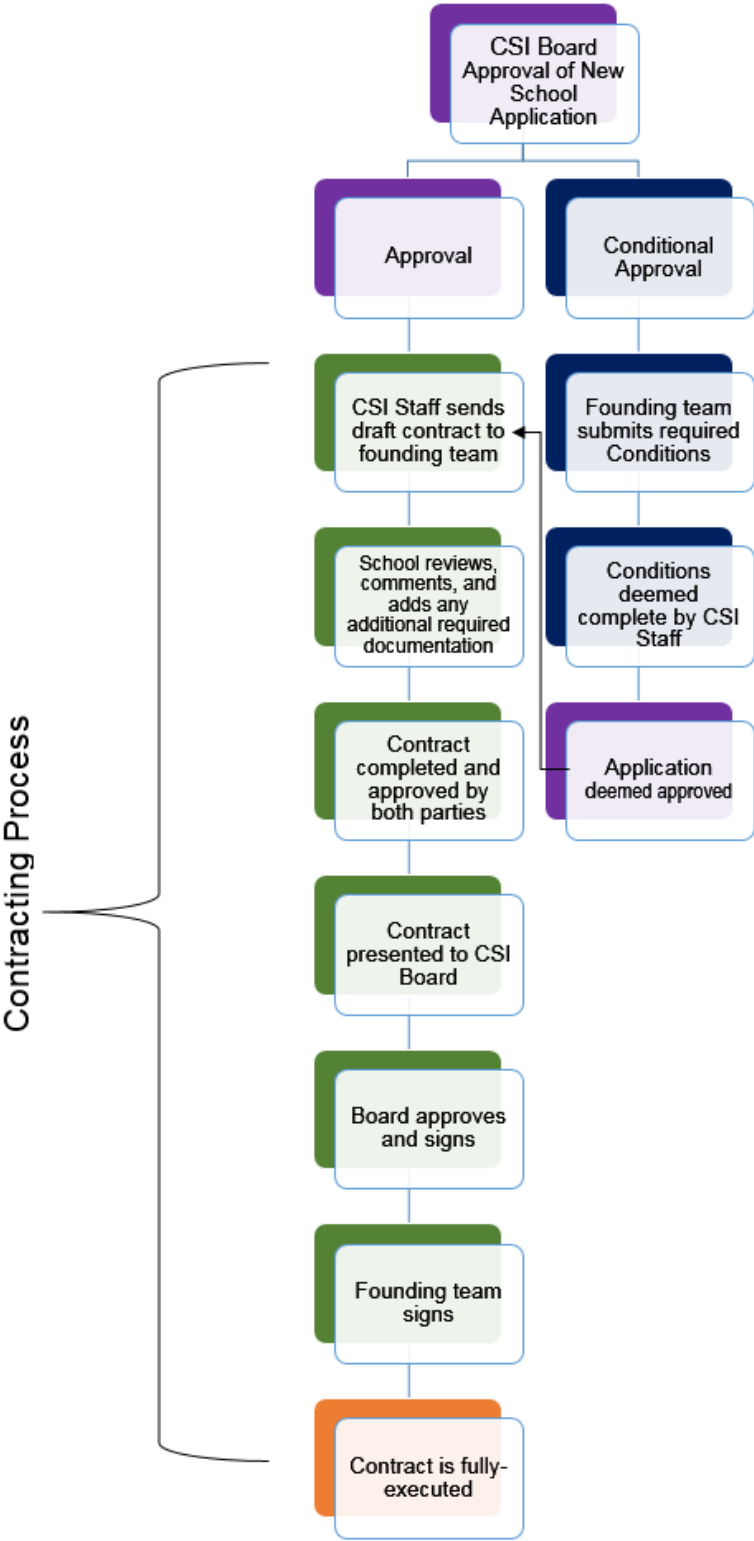
When the CSI Board approves an application for a new school, the application is either approved or approved with conditions. If the contract is approved without conditions, the Parties can immediately commence the contracting process. CSI Staff will send a draft of the contract to the School for review and comment, and the School will provide any additional documentation needed to finalize the Contract (e.g., Articles of Incorporation and Bylaws, final enrollment policy, waivers to be submitted to the State Board of Education for approval, etc.). By statute, all terms of the Contract are to be agreed upon by the parties no later than 45 days after the CSI Board approves the application. C.R.S. 22-30.5-510(2)(c). The parties may, however, jointly waive this 45-day deadline. C.R.S. 22-30.5-510(3).

At times, the CSI Board may conditionally approve a charter application. This is often seen where the application was incomplete or did not provide sufficient information. A conditional approval allows the applicant additional time to address any incomplete or insufficient components of the application. Upon satisfaction of all conditions, the application is deemed approved and the 45-day Contract timeline set forth above commences.

Once the Contract is fully compiled and the Parties agree to all terms, the Contract is then presented to the CSI Board for approval at the next regularly-scheduled board meeting. Upon approval and signature by the CSI Board, the Contract is sent to the School to be signed by the School's Board. Upon signature by both the CSI Board and the School's Board, the Contract is fully-executed.

The contracting process is a collaborative one in which CSI and the proposed school will develop an agreed upon contract for the term length identified by the Board of Directors at the time of application approval.

PROCESS & TIMELINE



CHAPTER 3: TECHNICAL ASSISTANCE

CSI provides a variety of supports to approved applicant teams during their Year 0 planning year including check-ins, site visits, peer-to-peer learning opportunities, and Colorado Charter School Program grant reviews, if applicable. These technical assistance tools provide teams with resources and allow approved applicants to demonstrate that there is the leadership and organizational capacity to serve public school students on day one.

MONTHLY CHECK-INS

Shortly after contract execution, approved applicant teams will participate in monthly readiness check-ins with the Director of Student Services and applicable CSI staff to monitor progress towards opening readiness tasks and support the founding teams with resources and technical assistance. This process is distinct from any communications regarding the submission of conditions and milestones. Standard monthly agenda topics are listed below but may change depending on the individual needs of the founding team. These calls will be personalized to the needs of each school in their Year 0. Individual school teams will take the lead in all Year 0 activities and CSI staff will provide resources and technical assistance, when appropriate.

PEER-TO-PEER LEARNING OPPORTUNITIES

Throughout Year 0, approved applicant teams will have opportunities to learn from successful charter school staff within the CSI portfolio of schools. Based on the individual needs of the founding team, the Director of Student Services will coordinate peer learning options including face to face meetings, school visits, and regional meetings.

Calendar of Events:

Fall Regional Meetings & Board Training

Western Slope: Monday, September 16th, 2019

Denver: Friday, September 20th, 2019

Colorado Springs: Friday, September 27th, 2019

Winter Regional Meetings & Board Training

Western Slope: Friday, December 6th, 2019

Colorado Springs: Wednesday, December 11th, 2019

Denver: Friday, December 13th, 2019

School Leader Meeting & Board to Board Networking & Training Event

Denver Area: Wednesday, March 4th, 2020

Spring Regional Meetings & Board Training

Colorado Springs: Friday, May 8th, 2020

Denver: Wednesday, May 13th, 2020

Western Slope: Friday, May 15th, 2020

SITE VISITS

While monthly check-ins will be primarily done over the phone or web conference, several will take place in person through site visits conducted by the Director of Student Services and other CSI Staff. Informal site visits will be scheduled with founding teams to take place in the summer before school opening, with a follow up visit in the fall of Year 1. In addition, CSI Staff will conduct the formal Preparedness Visit in late June or early July of the end of Year 0.

The Preparedness visit will be an on-site review by CSI personnel that gauges overall readiness for school opening. The preparedness visit shall include a review of program, facility, and fiscal documentation and interviews with board and staff members of the proposed charter school to assess organizational leadership and capacity.

	Delivery Method	Item
Governance		
1	Submitted 1 week before visit or Reviewed on-site	Evidence of regular board meetings and minutes indicating the understanding of key laws (e.g., Open Meeting Law) posted on website
2	Submitted 2 weeks before visit	Board policies passed to date by the school's Board of Directors (background check, nepotism, conflict of interest policies, etc.)
3	Submitted 1 week before visit	Evidence of a School Accountability Committee Plan
Safety		
1	Submitted 1 week before visit	Documentation of passing a fire inspection
Facilities, Furniture & Equipment		
1	Reviewed on site	Evidence of Safety Plan on site and relevant posted policies
2	Reviewed on site	Evidence that appropriate FF&E are on site ready for students.
Food Service		
1	Submitted 1 week before visit	Food service contract for upcoming year aligned with Free & Reduced Lunch requirements (if applicable)
Staff Hiring, Development & Training		
1	Reviewed on-site	Teacher file compliance, including licensing and fingerprint clearance letters
2	Submitted 1 week before visit	Master Schedule, including teaching assignments by grade level or specialty that aligns to mission and application
3	Submitted 1 week before visit	Update on staffing and professional development timeline
Enrollment & Student Records		
1	Pre-visit check	<ol style="list-style-type: none"> 1) Evidence of enrollment of at least 90 percent of approved maximum enrollment in SIS 2) Attendance is set up 3) Staff SIS training plan

Sample Schedule:

9:00 - 9:15AM – Welcome and introductions.

9:15 - 9:45 AM – Tour building/Discuss work that still needs to be completed and timeline.

9:45 – 10:15 AM – Meet with Administrator Team

10:15 - 11:15 AM – Meet with Board Chair, and other board members as determined by the school

11:15 AM– 12:00 PM – Recap visit and any additional materials CSI or school will provide.
Answer remaining questions.

PROJECT MANAGEMENT TOOLS

One of the keys to a successful school is having a comprehensive plan to maximize your Year 0 planning. We encourage schools to use the application approved by the CSI Board and map out all Year 0 tasks and timelines to be completed prior to opening. Many schools use a project management tool to backwards plan, manage their time, and track the completion of these tasks.

There are many sample project management plans available to support founding teams in completing the key aspects of school planning, however CSI encourages founding teams to develop a specific project management tool that is tailored to your individual school to ensure that all components of your application are executed, in addition to considering CSI deadlines and school-specific conditions and milestones.

Below are sample project management plans:

Colorado League of Charter Schools

Developed by the Colorado League of Charter Schools, this plan was created to help new school developers plan from the beginning stages of application writing to post-authorization. See page 31 of the plan for Post-Authorization Startup Plan. Please note, deadlines listed in the chart may not align to CSI deadlines.

[Colorado League of Charter Schools Startup Plan](#)

Rowe Elementary Startup Checklist

The Startup checklist below was developed by Bain & Company for Rowe Elementary School in Chicago. Rowe Elementary is a top 10 elementary charter school in Chicago Public Schools. Please note, the checklist may not include all Year 0 tasks and may not apply to all circumstances or school types. The checklist should be used as a starting point and as a set of example tasks to be tailored for each school.

[Rowe Startup Checklist](#)

Aspire Public Schools: An Approach to Opening New Schools

Aspire Public Schools (Aspire), a CMO based in Oakland, California, has developed a detailed and systematic approach to opening new schools based on nearly 10 years of experience

starting and operating charter schools in multiple geographies throughout California. This case study is an overview of Aspire’s school opening process – a summary that is intended to provide a framework for other school management organizations that are considering how to increase the effectiveness and efficiency of their own new school openings.

[Aspire New School Case Study](#)
[Aspire New School Work Plan](#)

Please note, these lists are not exhaustive. We encourage schools to develop a school-specific project management plan.

ORIENTATION

CSI staff hosts an Orientation for New School Leaders of new and existing CSI schools each July. During this two-day training, new leaders will have the opportunity to gain a high-level overview of CSI, meet CSI staff and learn how they will be working with them and their teams throughout the year, and network with other new leaders. Attendance at Orientation is *required*.

WEBSITE CALENDAR

To get a sense of the various deadlines and events hosted by CSI’s departments, new schools are encouraged to access CSI’s website calendar: <https://www.csi.state.co.us/calendar/>

MONTHLY SCHOOL NEWSLETTERS

CSI publishes a monthly school newsletter to school staff. The newsletter includes a letter from CSI’s Executive Director as well as updates and reminders from each of our departments. CSI adds the school leader email address to the monthly school newsletter in the spring prior to opening. Please email amandaoberg@csi.state.co.us to have your email address or other staff member email addresses added to the CSI monthly newsletter distribution list.

QUARTERLY SCHOOL BOARD NEWSLETTERS

CSI publishes a quarterly school newsletter to school board members. The newsletter includes reminders about upcoming board trainings and events as well as provides board development topics. CSI adds the school board chair email address to the monthly school newsletter in the spring prior to opening. Please email amandaoberg@csi.state.co.us to have your email address or other board member email addresses added to the CSI quarterly school board newsletter distribution list.

GRANTS & FUNDING OPPORTUNITIES NEWSLETTERS

CSI publishes a grants & funding opportunities newsletter for school leaders and Finance/HR staff. The newsletter includes upcoming grant deadlines as well as professional development opportunities. Please [update your email preferences](#) to be added to this distribution list.

PORTFOLIO HIGHLIGHTS NEWSLETTERS

CSI publishes a portfolio highlights newsletter for school leaders and those who opt in. The newsletter includes highlights from CSI schools, including positive stories on administrators, students, and teachers. Please [update your email preferences](#) to be added to this distribution list.

CHAPTER 4: CSI STAFF

While the Director of Student Services and the Director of Legal & Policy Initiatives will be your main contacts during Year 0, we encourage founding teams to utilize the expertise of the entire CSI team when specific questions or support needs arise.

Staff (click to email)	Title	Responsibilities/Expertise	Phone
Terry Croy Lewis	Executive Director		303.866.2704
Legal & Policy Department			
Anastasia Hawkins	Director of Policy and Legal Initiatives	Board Governance Charter Contracts Organizational Compliance Legal Questions	303.866.6960
Marisa Bayless	Policy and Legal Associate	Legal Questions Policies and guidance support	303.866.6714
Student Services Department			
Clare Vickland	Director of Student Services	Student Program Compliance and Evaluation State and Federal Program Grants New Leader or Staff Orientation and Resources New/Transfer School Onboarding Principal/Administrator Induction	303.866.3041
Kimberly Caplan	Gifted Education & Professional Learning Manager	Gifted Education Title Program Activity Support Teacher & Specialized Service Provider Induction Principal Induction Teacher Qualifications Student Services Screener Case Manager	303.866.6201
Matt Hudson	Director of Special Education	Special Education School Health/Nursing Student Services Screener Case Manager	303.866.6021
Michael McManus	Career Pathways & School Programs Coordinator	Career & Technical Education ICAP, Concurrent Enrollment, ASCENT School Health/Nursing Title Program Activity Support	
Nick Stachokus	Schools Programs Specialist	Section 504 ELL Title Program Activity Support Early Childhood (READ Act Colorado Preschool Program) MTSS McKinney-Vento Homeless Assistance Student Services Screener Case Manager	303.866.2735
Donna Day	Special Education Coordinator	Special Education compliance & support Director Designee	
Josh Nichols	Special Education Coordinator	Special Education compliance & support Director Designee	
Brian Printz	Special Education Coordinator	Special Education compliance & support Director Designee	
Katie Sisk	Special Education Coordinator	Special Education compliance & support Director Designee	
Data Submissions Department			

Janet Dinnen	Chief of Staff	New & Conversion School Application Cycles Impact Aid Federal Grant School Data Requests Communications / Website	303.866.4643
Julie Eddy	Data Manager	Data Validation and Audit Processes Data Privacy and Security School Data Requests Free / Reduced Lunch Eligibility	303.866.3093
Jessica Rogers	Data Submissions Coordinator	Data Pipeline Interchange File Submissions State and Federal Data Submissions SASID and EDID Requests FileZilla Account Access	303.866.4023
Ryan Hartung	Data Submissions Coordinator	Data Pipeline Interchange File Submissions State and Federal Data Submissions SASID and EDID Requests FileZilla Account Access	303.866.6973
Communications Department			
Amanda Oberg	Communications Coordinator & Board Liaison	Newsletters Social Media: Facebook and Twitter Communications / Website CSI Board Liaison	303.866.5193
Finance Department			
Amanda Karger	Director of Finance	Financial Compliance Guidance Budget and Forecast Questions Enrollment Projections Finance Questions Year-End Rebate	303.866.2856
Marcie Jackson	Grants Fiscal Coordinator	School Payments Request for Funds Competitive & State Grants Grant Budget Revisions End of Year Annual Financial Grant Reporting	303.866.6841
Cassandra Walgren	Controller (part-time)	Data Pipeline Financial Reporting	303.579.1040
Dave Sever	Controller	Other Financial Year-End Reporting Technical Guidance Alio Financial Software Transportation Reimbursement Reporting	303.866.2741
Allegra Matus	Human Resources and Accounts Payable Manager	Financial Transparency Act Requirements School Payment Status Employers Council/Human Resources Assistance	303.866.6972
Julia Linares-Roake	Accounts Payable and Grant Technician	School Payments Request for Funds	303.866.3299
Emma Post	Office Administrator	CSI Office Management School Contact Information updates	303.866.3299
Evaluation & Assessment Department			
Ryan Marks	Director of Evaluation and Assessment	CSI Annual Review of Schools Process & Tools CSI and State Accountability Academic Progress Monitoring Renewal, Transfer, Replication, Expansion Application Cycles and Evaluation	303.866.2572

Greg Nusz	Assessment and Program Evaluation Specialist	Assessment Coordination Support Strategic Improvement Support Unified Improvement Planning & Monitoring Accountability Support Annual and Seasonal Academic Evaluation	
Jessica Welch	Assessment and Improvement Planning Specialist	District Assessment Coordinator READ Act and School Readiness Unified Improvement Planning & Monitoring Strategic Improvement Support EL Assessment and Programming Support Gifted & Talented Assessment, Advanced Learning Plan, and Affective Needs	303.866.2366
Aislinn Walsh	Performance and Accountability Analyst	School Data Support Interim Assessment Analysis Accountability Support Authorization Support Sector Planning	303.866.6741

CHAPTER 5: GOVERNING BOARDS

Charter School Boards are tasked with the oversight of the school, have critical roles and responsibilities, and greatly contribute to the success of a school. CSI prioritizes engagement and training with schools boards, recognizes the critical role of founding boards, and provides a variety of supports in this area, including:

Contracting with a **CSI Leadership Consultant** who supports school leaders and governing boards through training and mentoring.

Offering **Board to Board Networking and Training Events** following each Regional Meeting (September, December, and May) and the School Leaders Meeting (February) of each year.

Publishing a **CSI Board Quarterly Newsletter** that highlights upcoming events, policy guidance, and important reminders related to school governing board responsibilities. Archived editions can be obtained by emailing Amanda Oberg at amandaoberg@csi.state.co.us.

Charter Board Partners have published a [Governance Best Practices for Highly Effective Charter School Boards](#) guide that outlines the Life Cycles of boards, the relationship between the board and the school leader, key elements of highly effective boards, board committee structures, meeting requirements, and sample job descriptions and templates to support new boards in creating strong structures and practices

The **National Charter School Resource Center**, in partnership with other organizations, have developed several webinars relevant for board members. Sample topics include [Recruitment for Governing Boards](#), [Charter School Board's Role in Oversight](#), and [I Just Joined a Charter School Board...Now What?](#)

The **Colorado League of Charter Schools** also emphasizes that effective governance is a critical component to a high-quality charter school and provides additional resources for charter schools, including training opportunities for charter schools including customized governance training, strategic planning facilitation, and [online modules](#).

Below is a sample School Board Profile worksheet created by the League:

Sample Charter School Board Profile Worksheet

Categories to Consider	Board Members										
	Ramona	Tom	Manuel	Elsa	José	Andrea	Barb	Mague	Rebecca	Francisco	Mark
Area of Expertise/Professional Skills:											
Organizational and Financial Management	X	X		X	X					X	X
Community Development/Facility/Project Management	X	X		X	X					X	
Administration	X									X	
Academic / Education	X					X	X			X	X
Business / Corporate							X				
Accounting											X
Banking and Trusts*											
Investments*		X									
Fund-raising / Capital Campaign*				X							
Charter School Law / Regulations			X								
Government Representative		X	X								
Law			X								
Marketing											
Human Resources											
Physical Plant (architect, engineer)											
Strategic or Long-Range Planning**										X	
Public Relations											
Real Estate		X									
Community Resident	X	X		X	X			X	X	X	
Parent of Child in School								X	X		
Business Owner							X				
Teacher						X				X	X
Partnerships/Social Services	X				X					X	
Technology											X
Latino/Culture Competency	X			X	X			X	X	X	
Other (List)											
Other (List)											

Key Year 0 Activities for Boards

- Apply for 501c3 status with IRS
- Implement permanent board and announce meetings according to open meetings law.
- Conduct governance orientation for founding board and plan for continued development
- Establish committees as required in bylaws, and as needed for special projects. This should include a School Advisory Committee (SAC).
- Review board policies and procedures and revise as necessary.
- Design and form desired sub-committees
- Define roles, responsibilities, and skills/experiences needed of the School Accountability Committee
- Schedule an annual Board Retreat (to be held in Year 1)

CHAPTER 6: ASSESSMENT PLANNING

There are several required assessments that charter schools must participate in for accountability purposes. Proposed school teams should use the draft assessment calendar submitted in their application to guide their Year 0 planning. Planning teams should ensure that the following required assessments are incorporated into their school calendar accordingly:

Required Assessment	Grades Tested	Testing Window
WIDA Screener	New K-12 students with "Yes" on Home Language Survey	First 30 days of enrollment
School Readiness Assessment Schools must select one of the approved assessment options	K	First 60 days of enrollment
READ Act Schools must select one of the approved assessment options	K-3	First 30 days of enrollment, 3x/year
ACCESS for ELLs	K-12 NEP/LEP	Early January-February
CMAS: Science & Social Studies	4, 7 & 11 (Social Studies) 5, 8 & 11 (Science)	Mid-April
CMAS: ELA/Math	3-8	Mid-April
PSAT 8/9	9	Mid-April
PSAT 10	10	Mid-April
SAT	11	Mid-April

CSI's assessment staff is responsible for overseeing the training of school assessment coordinators in the proper administration of required state and federal assessments. For more information about assessments please visit the [CSI website](#) and click on the appropriate assessment or contact CSI's Assessment and Improvement Specialist, Jessica Welch (jessicawelch@csi.state.co.us). CDE's [Assessment website](#) also provides additional information about the required assessments.

In addition to the required state and federal assessments, all CSI schools must conduct interim assessments. Schools have the autonomy to select the interim assessment measures that best align with their school's unique model and philosophy.

Key Year 0 Activities for Assessment

- Select and purchase state-approved School Readiness Assessment
- Select and purchase state-approved literacy assessment (READ Act)
- Select and purchase interim assessment(s)
- Draft and submit assessment policy
- If administering computer-based assessments, purchase adequate number of student devices
- Establish School Assessment Coordinator role

CHAPTER 7: FACILITIES & FINANCE

There are many federal and state requirements that charter schools must fulfill as part of their public fiduciary responsibilities. Many of these requirements must be fulfilled prior to receiving public funds from local, state, and/or federal governments. It is strongly recommended that proposed school teams include a position or contractor who is familiar with the financial reporting and management requirements that are unique to governmental funds, and in particular, public schools within Colorado. While a new school can use the budget included in their application to start, schools will often need to refine this budget as public and private funding sources materialize throughout year 0.

FINANCIAL ACCREDITATION REQUIREMENTS

At the end of each fiscal year, schools are required to submit their financial assurances for financial accreditation to CSI and CDE. The most current assurances form can be found [here](#), and is a good resource for a summary of the statutory requirements related to fiscal management.

FINANCIAL TRANSPARENCY ACT

All CSI schools are required to have a section of their website that complies with the prescribed template dedicated to Financial Transparency. Requirements, including the prescribed template can be found on CDE's website [here](#).

BUDGET DEVELOPMENT

Prior to receiving public funds, schools must adopt a budget in order to expend these funds, and post the information to their financial transparency website within required timeframes. A copy of each board adopted budget, including the signed board adoption resolution must be provided to CSI.

Adopted budgets must include:

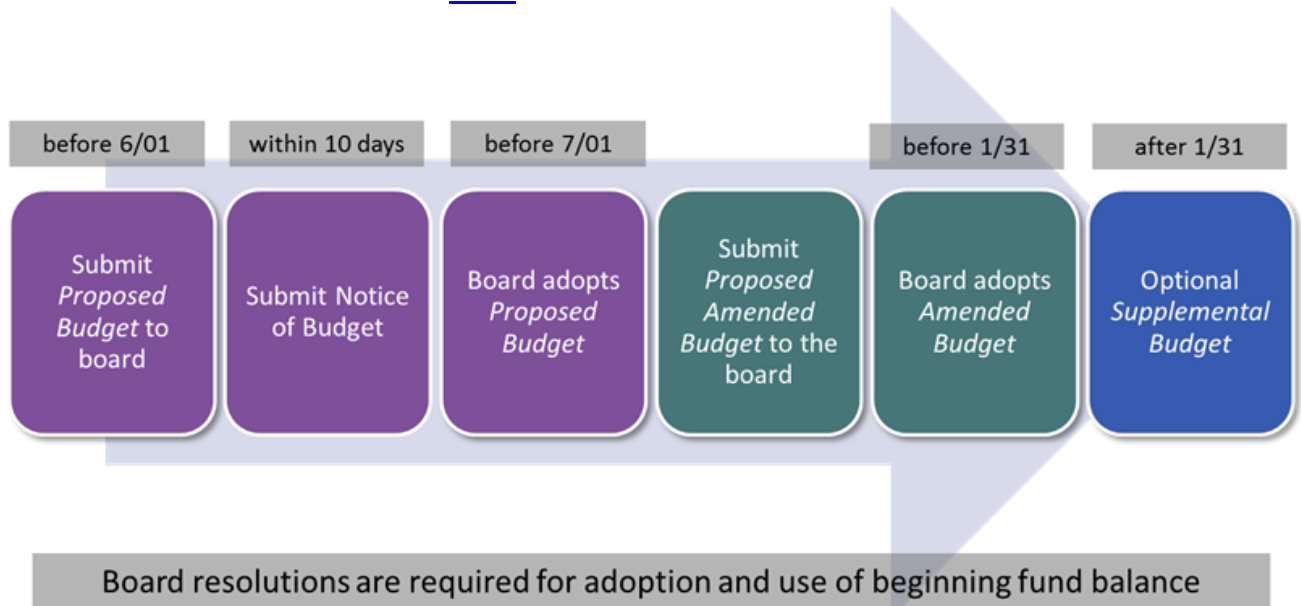
1. Board approved appropriation resolutions for adoption and use of beginning fund balance (if applicable)
2. The CDE Uniform Budget Summary Format
3. A detailed format pursuant to (C.R.S. 22-44-105)

The school will need to complete the following budget activities in Year 0 to prepare for year 1 operations:

1. Submit to the school board the proposed budget for Year 1 by June 1 of Year 0 (i.e. FY 2018-19 proposed budget submitted to school board by June 1, 2018).
2. Post a Notice of Budget (C.R.S. 22-44-109) within 10 days of submission of the proposed budget to school board.
3. School board must adopt a budget by June 30 through approved appropriation resolutions

Additional information:

1. Amended Budgets: The board may adopt an amendment to the budget any time before January 31st of each year.
2. Supplemental Budgets: The board may adopt a Supplemental Budget any time after January 31st of each year as long as it meets the following criteria:
 - a. Adopted before expenditures in excess of the last-adopted budget are incurred
 - b. Adopted before June 30th of the current year
 - c. If money for a specific purpose becomes available after January 31 to meet a “contingency,” which is defined in statute as: “an act of God or the public enemy, or some event which could not have been reasonably foreseen at the time of the adoption of the budget”
3. School Budget requirements and templates can be found on CSI’s website [here](#).
4. A summary of non-competitive funding sources to consider in preparing the budget can be found on CSI’s website [here](#).



BANKING

Schools must use an eligible public depository for banking services. The Colorado Public Deposit Protection Act (PDPA) requires that all units of local government deposit cash in eligible public depositories. Eligibility is determined by state regulations. Information about PDPA requirements can be found [here](#).

In order to find a list of PDPA eligible depositories, go to: <https://www.colorado.gov/pacific/dora/node/97556>, click on Find an Institution, and under the dropdown for institution type, select “PDPA eligible depositories”, and click “search”.

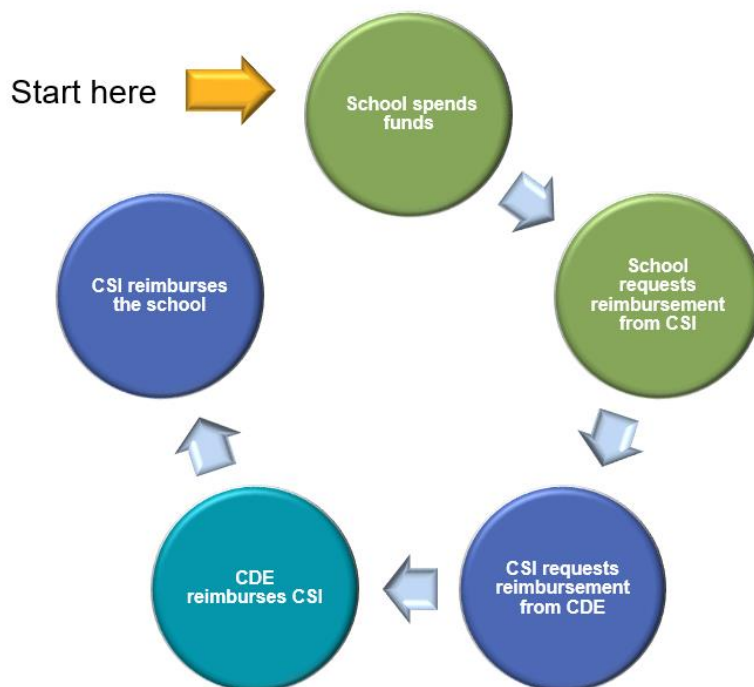
In addition to keeping deposits in a PDPA eligible depository, schools are required to apply to the Division of Banking for (an) identification number(s) for any monies in bank deposit accounts. To do this, fill out the PDPA custodian [form](#), and submit to the division of banking according to the instructions on the form.

When the Official Custodian Identification Number(s) have been obtained, schools must provide each eligible public depository, in which funds are deposited, with the assigned identification numbers.

COLORADO CHARTER SCHOOLS PROGRAM GRANT

The Schools of Choice Office at the CDE manages the Colorado Charter Schools Program (CCSP) grant. The CCSP grant is available for new charter schools and provides start-up funds and technical assistance for up to 3-years. For more information and the grant application, please visit <http://www.cde.state.co.us/cdechart/GrantPrograms>. If awarded the CCSP grant, in order to get reimbursement for eligible funds spent, the request for funds process will need to be followed as listed below.

Request for Funds Process



CCSP request for funds are due on the 9th or the next business day (if the 9th falls on a weekend or holiday) of each month.

A complete request includes:

1. Request for Funds form
2. Request for Funds Summary
3. Budget to Actual Report, when applicable
4. Back up Documentation, including proof of payment

CSI ASSISTANCE FUND

<https://resources.csi.state.co.us/financial-services-library/>

The Assistance Fund was created by the General Assembly to assist CSI Schools with capital construction and reasonable emergency financing in the form of interest free loans or grants.

CSI schools may apply for funds in one of the following categories:

- a. Matching Moneys for the BEST Program
- b. Financing Repayment of Moneys under CECFA or Other Loan
- c. Other Capital Construction Costs
- d. Reasonable Emergency

Applications for non-emergency loans will be accepted in February of each year. Applications for emergency loans may be submitted at any time.

ONLINE FINANCIAL RESOURCES

Colorado Department of Education School Finance Unit

Resource for schools including information on state requirements for all phases of financial planning and management

<https://www.cde.state.co.us/cdefinance>

Financial Transparency Act

All schools must comply with the Financial Transparency Act. CSI monitors compliance at least quarterly.

www.cde.state.co.us/cdefinance/sfFinancialTransparency.htm

Per pupil revenue payment information for all years

Find current-year and historical per pupil revenue information.

www.cde.state.co.us/cdefinance/sfdetails.htm

Alternate At-Risk Funding Calculation

All CSI schools are subject to the Alternative At-Risk Funding Calculation. This calculation adjusts a school's per pupil revenue according to the school's relative at-risk population (students eligible for free lunch).

www.cde.state.co.us/cdefinance/charteratrisk.htm

Financial Policies and Procedures Handbook

The Financial Policies and Procedures Handbook adopted by the State Board of Education shall be used by every school district in this state in the development of the budget for the district, in

the keeping of financial records of the district, and in the periodic presentation of financial information to the Board of Education of the district. C.R.S. 22-44-204(3)

www.cde.state.co.us/cdefinance/sfFPP.htm

Chart of Accounts

All Colorado charter schools and school districts must use the Chart of Accounts to account for financial activity.

www.cde.state.co.us/cdefinance/sfCOA.htm

Capital Construction Funding

CSI charter schools can use Capital Construction Funding to pay for purchasing or leasing of facilities, financing, construction, renovating and maintaining.

<http://www.cde.state.co.us/cdefinance/CapConstcharterscls>

School Transportation

<http://www.cde.state.co.us/transportation>

Key Year 0 Activities for Finance and Facilities

- Apply for 501(c)3 status from the IRS for the school and/or related foundation
- Setup bank account for school at a bank that is an eligible PDPA depository
- Send bank account information to Allegra Matus (allegramatus@csi.state.co.us)
- Setup Financial Transparency Website
- Board adoption of Financial Policies meeting federal and statutory requirements ([sample financial policies](#)) and post to school website after adoption
- Purchase Financial System and setup utilizing [CDE's chart of accounts](#)
- Purchase and setup payroll system if using
- Develop cash flow forecast ([optional template](#)) and update monthly with actual bank activity
- If receiving public funds (including CCSP) in year 0:
 - Board adoption of year 0 Budget
 - Submit monthly financial reports to CSI
- Board adoption of Year 1 Budget
 - Develop Cash Flow Forecast for year 1 by June 30
- Setup PERA account

CHAPTER 8: DATA SUBMISSIONS PLANNING

Public schools are legally required to report data through various data collections throughout the school year. Several of the collections have funding implications (like October Count and December Count) or are used for compliance monitoring purposes (like Special Education End of Year) at the federal, state, and local (CSI) levels. In fact, data from the majority of data collections are used by CSI staff for the CSI Annual Review of Schools (CARS), determination of tiered supports, and/or compliance monitoring. Additionally, several collections are used to populate the federal Civil Rights Data Collection.

The role of the CSI Data Submissions Team is to support schools in the timely and accurate submission of data for state and federal reporting requirements. The CSI Data Submissions

Team serves as the liaison between CSI schools and the Colorado Department of Education (CDE) for each data collection and provides training, technical assistance, and access to resources to CSI School Data Submissions Contacts.

Effectively planning and setting up systems as well as collecting necessary student and staff data during Year 0 can reduce the burden of many reporting requirements for CSI schools.

Data Management Systems

Schools utilize data management systems to collect and maintain student and staff data. These systems are used to extract reports that are used for state reporting. A summary of the systems needed and suggested timelines for implementation can be found below. For specific questions related to the selection or implementation of data management systems, please contact Janet Dinnen, Chief of Staff.

Student Information System

The two primary student information systems used by CSI schools that align to state reporting requirements for student data collections are PowerSchool and Infinite Campus.

Schools should engage with their preferred SIS vendor in late winter/early spring prior to opening to purchase the system and schedule the necessary training for system setup and use. The vendor will provide an implementation timeline to support your school's proper setup of the information system. Please know that there will be a significant amount of time needed to set up the SIS properly as setup includes the creation of a school calendar, attendance preferences, scheduling, courses, etc. Schools should contact CSI early on in the process to share helpful resources on the new system setup related to the Colorado state reporting collections.

Vendors provide training to ensure appropriate setup and data entry for your system. Schools can access [Campus Community](#) for Infinite Campus or [PowerSource](#) for PowerSchool.

Schools are required to provide CSI an account to access its student information system to monitor appropriate setup and support with state reporting.

Student Plan Management System (if different from the SIS)

The two student plan management systems that align to state reporting requirements for special education data collections are Alpine Achievement and Infinite Campus.

Schools should engage with their preferred plan management system vendor in late spring / early summer prior to opening to purchase the system and schedule the necessary training for system setup and use. The vendor will provide an implementation timeline to support your school's proper setup of the information system.

Vendors provide training to ensure appropriate setup and data entry for your system. Schools can contact CSI to share helpful resources on data entry as it relates to state reporting.

Schools are required to provide CSI an account to access its student information system to monitor appropriate setup and support with state reporting.

Human Resource Data Management System

Most CSI schools are using Excel to manage the HR data collection. For schools in their first year of operation and without a system to extract required HR data for state reporting, filling out the Staff Profile and Staff Assignment templates (found here: https://www.cde.state.co.us/datapipeline/inter_staff) in accordance with the allowable values found in the Staff Profile and Staff Assignment File Layout and Definition guides (found here: <https://resources.csi.state.co.us/human-resources/>) can ensure you are ready for this data collection. Schools are encouraged to begin filling out the templates as new hire paperwork is coming in to ensure there is ample to review and correct data before state reporting deadlines.

(After the school’s first year of operation, CSI will be able to provide each school its prior year Staff Profile and Staff Assignment files so that schools are only having to add new rows for new staff, remove existing rows of data for former staff, and adjust data for staff that have had changes to their roles.)

Data to Collect on Student Registration Forms

Much of the student data required for state reporting can be collected direct through student registration forms, including:

Last Name	Race (all that apply)	Military Connected
First Name	Language Background	Grade Level
Middle Name	Free / Reduced Lunch Eligible	Date First Enrolled in US
Gender	Homeless	Parent Address
Date of Birth	Primary Nighttime Residence	
Ethnicity (Hispanic or Latino)		

Please access the [CDE Student Demographic File and Student School Association File](#) to see a complete listing of the fields, definitions of each field, and a list of allowable responses to each field for state reporting purposes. To the extent possible, please ensure any student registration forms you are using are requesting the applicable student data needed for state reporting.

The following forms should also be included in your student registration packet and will help to ensure some of the fields above are captured.

Home Language Survey

All students new to your school must complete a Home Language Survey as the first step in determining English language proficiency. A list of required questions and information about the English Learner identification process can be found in the [CDE EL Guidebook](#).

Data from this form, and the subsequent assessment of students with home languages other than English, will be used to populate the English Learner fields (Language Background, Language Proficiency, and Language Instruction Program) in the student information system.

Economic Data Survey / Free or Reduced Price Meal Eligibility Form

Schools not participating in a federal child nutrition program can request that families complete the [Economic Data Survey](#). School staff reviews the responses against federal criteria to determine free or reduced lunch eligibility.

Schools participating in a federal child nutrition program will have families complete a Free and Reduced Meal Benefit Application to determine free or reduced lunch eligibility. The form and identification is typically managed by the School Food Authority (SFA) on behalf of the school.

Data from these forms will be used to populate the Free and Reduced Price Lunch field in the student information system.

More info about determining free and reduced price lunch eligibility can be found on the [CSI FRL Eligibility webpage](#).

Residency Information for the McKinney-Vento Act

Schools may use the McKinney-Vento Act Residency Form to assist in the identification of homeless students at the school.

Data from this form will be used to populate the Homeless fields (Homeless, Primary Nighttime Residence) in the student information system.

More information about this form and homeless student identification can be found on the [CSI McKinney-Vento webpage](#).

Internal Forms and Processes

Schools may need to develop internal forms and/or processes for collecting student data that is determined by school staff (ex: the determination of English learner, gifted, special education status following an identification process).

Data Entry into a Student Information System

As student data is being collected through the student registration process and internal processes, it should be entered into the school's student information system (SIS). The two primary used SIS within the CSI portfolio are Infinite Campus and PowerSchool.

New schools can expect to spend a significant amount of time entering student data into the SIS in their first year of operation as they will be inputting data for each student enrolled. In future years, schools will only need to add new students in the lowest grade level (ex: kindergarteners), any new students enrolling in existing grades, and updating any applicable data for returning students. Because the first year requires more time to input all students into the SIS (and potentially for school staff assigned to this task to familiarize themselves with the SIS), data entry should begin as soon as possible once a student has been registered.

The first student data collection of the school year is the October Count data collection. While Count Day takes place in early October, the data submissions process typically kicks off in late August/early September in order to give schools ample time to resolve errors prior to Count Day.

New Staff Paperwork

Much of the staff data required for state reporting can be collected direct through new hire forms, including:

Last Name	Address / District of Residence	Institute where Degree Earned
First Name		
Gender	Start Date	Subject Area of Degree(s)
Date of Birth	Years Principal <i>if applicable</i>	Passed Paraprofessional Test
Ethnicity	Highest Level of Education Completed	In – Field Status 1In – Field Status 2 <i>if applicable</i>
Race (all that apply)		

Please access the [CDE Staff Demographic File and Staff Assignment File](#) to see a complete listing of the fields, definitions of each field, and a list of allowable responses to each field for state reporting purposes. To the extent possible, please ensure any new hire forms you are using are requesting the applicable staff data needed for state reporting.

CSI offers an editable New Hire Form and editable IDEA School Instructor Form for schools to adapt for their own purposes, both of which can be accessed on the Human Resources page of the [CSI HR Data Collection webpage](#).

Internal Forms and Processes

Schools may have internal forms and processes for collecting data that is provided by school staff (ex: determination of a staff's assignment, salary, and contract days for the year). Some fields that are collected and determined by school staff include:

Start Date	Hours Worked per Day	Teaching Subject Area
Number of Contract Days	Hourly Rate of Pay / Salary	Number of Classes Taught

Again, please access the [CDE Staff Demographic File and Staff Assignment File](#) to see a complete listing of the fields, definitions of each field, and a list of allowable responses to each field for state reporting purposes. To the extent possible, please ensure any internal forms or processes you are using collect applicable staff data needed for state reporting.

Data Entry into a Data Management System

As staff data is being collected through new hire process and internal processes, it should be entered into the school's data management system. Most CSI schools choose to use Excel to collect the information.

Similar to new student paperwork, new schools can expect to spend a significant amount of time entering staff data in their first year of operation as they will be inputting data for each staff member hired. In future years, schools will only need to add new staff and update any necessary data for existing staff. Because the first year requires more time to input all staff into Excel (and potentially for school staff assigned to this task to familiarize themselves with the codes and Excel template), data entry should begin as soon as possible once a staff member has been hired.

The first staff data collection of the school year is the Human Resources (HR) data collection. While the HR data collection should capture staff as of December 1st, the data submissions process typically kicks off in late October in order to give schools ample time to resolve errors prior to December 1st. SPED staff information in the HR collection overlaps with the December Count collection, which occurs at the same time in the school year. HR and SPED staff at the school are encouraged to work closely together in order to complete both collections.

Request Student and Staff IDs

All students and staff must have a unique identification number associated with them for state reporting purposes. The student identification number is known as a SASID and the staff identification number is known as an EDID.

Once a staff member has been identified at the school to take the lead on state reporting and/or registration, please email submissions_CSI@csi.state.co.us with the contact's name and email address. CSI's Data Submissions Team will create the accounts necessary to access the state's RITS (for SASID requests) and EDIS (for EDID requests) systems. School staff can begin to use the [RITS](#) and [EDIS](#) systems to confirm whether students and staff are new to the public education. If the students or staff are not new to the system, their unique identification number will be visible for school staff to input into the SIS or data management system. If the students or staff are new to the education system, then a unique identification number must be requested for them.

For detailed instructions on the SASID attainment process for students or the EDID attainment process for staff, please visit the [CSI SASID/EDID webpage](#).

It is to the school's benefit to start making SASID and EDID requests at the beginning of the school year to ensure the unique identification numbers are attained and entered into your data management systems in advance of the applicable data collections.

Contacts and Resources

For more information about state reporting, please visit the [CSI Data Submissions webpage](#). Alternately, contact CSI's Data Submissions Coordinators, Data Manager, or Director of Data

and Communications. You may also send inquiries to the entire team at submissions_csi@csi.state.co.us.

Key Year 0 Activities for Data Submissions

- Purchase and begin setup of data management system(s)—at a minimum, the student information system and student plan management system
- Ensure student registration forms and staff new hire paperwork are collecting all information necessary for state reporting
- Begin to identify which students and staff have state ID's and which students and staff will need to have them requested
- Schedule training for staff in the use of any data management systems
- Once the SIS is purchased and a Data Submissions Contact is identified for your school, please email Submissions_CSI@csi.state.co.us to schedule an in depth orientation to the CSI data submissions process.

CHAPTER 9: SPECIAL POPULATIONS

During Year 0, the founding team is responsible for identifying and building out systems and structures that will allow the school to fulfill the programming identified in their charter school application, which includes serving special populations. The founding team should use the approved application as a guide to ensure that the school will address the needs of students through appropriate identification, programming, assessment, progress monitoring, resignation/exiting, service delivery model and continuum of supports.

Special Education

In order to ensure compliance with all local, state, and federal requirements to serve Special Education students, each school must develop a Special Education Plan. This plan must include information about how the school will conduct the following:

- School Responsibilities and Funding Requirements
- Child Find
- Special Education Referral, Evaluation, Eligibility Determination and Reevaluation Process
- Free Appropriate Public Education
- Individualized Education Programs (IEP)
- Confidentiality of Information, Procedural Safeguards and
- Dispute Resolution Processes for Parents and Children
- Student Discipline Procedures

This plan must be turned in to, and approved by, the CSI Director of Special Education before school begins. For more information on Special Education Rules (both state and Federal), please see the [CSI website](#).

CSI provides a comprehensive plan (manual) to deliver services to exceptional students. In addition, schools develop a Special Education Program Plan, in accordance with CSI's template. CSI schools will follow all state/federal rules including CSI policies and procedures. Schools should consult with these resources and guidebooks on the CSI website to ensure that they have a clear understanding of their responsibilities under the law. The CSI Director of Special Education is also available for consultation.

Funding

CSI is the Administrative Unit (AU) and collects IDEA and ECEA funds on behalf of the schools and distributes the dollars equally across schools based on the previous years' December count numbers. In addition, there is an additional distribution of ECEA funds each spring as a "true-up" for schools that have an increased number of special education students compared to the previous years' December count.

To be eligible for IDEA and ECEA funds each child receiving services must meet the eligibility qualifications for one or more of the 13 disabilities identified in IDEA and have an Individualized Education Program (IEP) that is created by an IEP team which delineates the specific special education and related services to be provided to meet his or her needs. The funds must be used only to pay the excess costs of providing special education and related services to children with disabilities. CSI schools are to prioritize the use of IDEA funds to pay for special education staff/providers salaries and benefits first and to use any left-over dollars (ECEA) to pay for remaining costs.

IDEA and ECEA funds may not be used for non-special education instruction in the general education classroom, instructional materials for use with non-disabled children, or for professional development of general education teachers not related to meeting the needs of children with IEP's. IDEA provides federal funding for the education of children with IEP's and requires, as a condition for the receipt of such funds.

Special Education Staffing

CSI is responsible for providing oversight of the schools' obligation for staffing highly qualified and appropriately certified related service providers, such as special education generalists, nurses, counselors, psychologists, speech/language therapists, vision specialists, audiologists, interpreters, occupational and physical therapists, etc. These positions are staffed based on needs* identified in student IEPs. Although charter schools may obtain state and district waivers for the licensure of regular education personnel, *licensure requirements special education staff may not be waived*. Please review the requirements on the CDE Website at www.cde.state.co.us/cdeprof/endorsementrequirements or contact CDE's Educator Licensing unit at educator.licensing@cde.state.co.us for questions about appropriate licensure and endorsements for special education teachers.

Each school must complete and send required HR information validating staff required credentials to CSI. All special education staff, including coordinators and related service providers, must be hired upon the start of the 1st day of school or by August 1st, whichever comes first. Due to challenges in obtaining qualified special education staff, the initial recruitment of Special Education Staff should occur in March/April with the intent to secure contractual agreements, especially if you are working with a BOCES or School district. The Special Education Coordinator should be obtained by July 1st to assist with enrollment determination and planning.

By April 1st of each year, CSI schools must inform CSI if there are plans to change the system it uses to hire special education staff, such as moving from an individual contract to contracting with a BOCES or School district.

Special Education Coordinator

The Special Education Coordinator (acts as the Special Education Director designee, is employed by CSI, and assigned to specific schools. The Coordinator serves as a liaison between schools and CSI's Special Education Director and provides technical support and consultation for all assigned schools and exceptional student school staff. The Coordinator is responsible for assisting CSI schools in implementing mission-critical projects as well as implementing refined department systems i.e. assist Special Education Director with audits for quality assurance, support, oversight, professional development, mediation, and accountability of the Student Services programs in CSI charter schools.

Special Education Staffing Ratio Recommendations

Position	Staff : Student Ratio	Description
Mild-Moderate Needs Teacher	20:1 SPED Ratio (Secondary)* 200:1 Gen Ed. Ratio 1:15 (Elementary)*	*Compare ratio of moderate needs teachers to moderate needs students and also compare ratio of gen. ed students to SPED teachers due to RTI for example, students requiring <7.5 hours per

		<p>week or spending >80% of their day in general education.</p> <p>*Look at amount of hours on IEPs to align with recommended ratios. Allow time for paperwork, meetings, assessments, etc.</p> <p>* Consideration of multiple roles and alignment with SPED funds i.e. 504, GT, Rtl, etc.</p>
Speech Language Pathologist	1:40-50	<p>ASHA recommends 1:40; Numbers can be adjusted upward to some degree if an SLP-A is also employed (do not double caseload)</p> <p>Compare to size of school and identified hours on IEPs</p>
School Psychologist/Counselor	1.0 FTE	<p>1 mental health FTE per elementary school, 1.2 at MS, 1.8 at HS</p> <p><i>Consider- 1. Size of schools 2. Type of behavioral health model, family engagement/support (i.e. SW), identified needs on IEPs</i></p>
CDE Licensed School Nurse	Contract as needed	Contract as needed per school with judgment based on size/need and delegation to Health Tech.
Health Tech	.5-1.0 FTE	Based on size/need of school and delegation by Nurse with a recommended minimum .5 FTE per School
OT/PT	1:40	If have COTA or PTA these numbers can be adjusted upward to some degree
Early Childhood Special Ed. Teacher	1:30	1 licensed ECSE teacher for 1AM and 1PM sections of preschool

These guidelines are based on typical caseload representation by CSI Charter Schools and includes variable time spent conducting IEP meetings, writing Plans, participating in Rtl, progress monitoring, etc. It is important to not only align the FTE of staff with what is noted for hours on an IEP, but also note that in cases of smaller schools that do not reach the minimum caseload size as presented in the table below, you will need to allot time for the special education provider to participate in these extraneous duties.

Year 0 Activities for Special Education

- Develop and submit school's special education program plan
- Budget for special education programming needs, including staffing
- Purchase an electronic plan management system that includes the template for Individualized Education Plans (IEPs)
- Plan for start of school training for staff on special education

GIFTED & TALENTED

Gifted Education is addressed in the Exceptional Children's Education Act (ECEA) in the Colorado Revised Statutes. The Colorado State Board of Education promulgates the rules for the implementation of statutes. The rules provide the administrative framework for schools and

CSI for the provision of services to gifted students. Schools need to be familiar with all state rules and guidelines and should refer directly to the CDE Office of Gifted Education website [Laws and Regulations page](#).

To ensure compliance with all local, state, and federal requirements to serve gifted students, CSI expects every school to maintain a Gifted Education Program Plan that addresses the following:

- Methods by which the school will communicate with parents and students about giftedness and gifted programming
- Criteria and procedures for identifying gifted students
- Procedures for developing the Advanced Learning Plan
- Instructional programming for gifted students
- Annual process for evaluating the gifted program
- Hiring and training personnel
- Budgeting
- Record keeping & reporting

Funding

The primary funding source for gifted education is per pupil revenue. State categorical funds for gifted education (3150) are supplemental and help to offset the costs of a gifted program. CSI allocates the categorical funds by providing each school base funding of \$500 and distributing the remaining funds to schools based on the per pupil gifted count from prior year October.

Universal Screening Grant

The Colorado Department of Education and House Bill 14-1102 provide schools the opportunity to apply for funds to offset the costs of conducting Universal Screening in a K-2 grade, and/or in conjunction with ICAP planning at the middle school level. “Universal Screening” means the systematic assessment of ALL students within a grade level for identifying students with exceptional ability or potential. Schools are strongly encouraged to include universal screening in identification procedures. CSI conducts a grant application process in May for schools wishing to apply for funds to offset the cost of purchasing state approved cognitive or behavioral assessments for Universal Screening.

Year 0 Activities for Gifted Education

- Develop and submit school’s gifted program plan
- Budget for gifted programming needs, including staffing to support gifted students
- Apply for the Universal Screening Grant in May
- Purchase an electronic plan management system that includes the template for the Colorado Standards Aligned Advanced Learning Plan
- Purchase state approved assessments for gifted identification
- Plan for start of school training for staff on gifted education

SECTION 504

The terms “504” and “Section 504” refer to Section 504 of the Rehabilitation Act of 1973. This act protects people with disabilities against discrimination. Students eligible for services under

Section 504 have a mental or physical impairment that substantially limits major life activities. CSI is the agency that oversees school compliance with Section 504. For additional information regarding Section 504 please review the CSI Comprehensive Manual for 504.

Section 504 Coordinator: Each school is required to have a Section 504 Coordinator, who is the building principal or designee. A principal may designate any staff member, except a special education teacher who is fully funded using special education dollars, to serve as the school Section 504 Coordinator.

Charter School Responsibilities

- Admit and serve all eligible 504 students in following the admission process specified in their charter contract
- Screen, identify and serve the needs of students eligible for 504 plans and provide all accommodations and/or services indicated on students' 504 plan, using Alpine Achievement to maintain all records
- Assign a 504 Coordinator and complete all relevant forms and paperwork in a timely manner to identify students in need of 504 services
- In case of a dispute about whether the school can adequately serve a student, hold an 504 meeting to determine the appropriate educational setting

CSI Responsibilities

- Serve as the AU responsible for ensuring charter school compliance with applicable 504 laws including oversight of schools providing all supports as outlined in students' 504 plans
- Check compliance with 504

Year 0 Activities for Section 504

- Develop and submit school's Section 504 plan
- Determine which staff will act as the 504 coordinator and a plan for their training
- Plan for start of school training for staff on Section 504.

ENGLISH LANGUAGE LEARNERS

To ensure compliance with all local, state, and federal requirements to serve English Learners, CSI expects every school to maintain an English Language Development (ELD) Plan. Founding teams should collaborate with CSI School Programs Specialists to complete the ELD plan during the summer before opening.

ELD Plan Components:

1. Introduction
2. Identification of the Primary Language other than English (PHLOTE)
3. Assessment of EL Students
4. Instructional Program and Education Approaches for EL Students
5. Staffing and Professional Development
6. Reassessment, Reclassification, and Exiting

7. Equal Access to Other Charter School Programs
8. Parent and Community Involvement
9. Program Evaluation, Review, and Improvement

Funding

The primary funding sources for English Language Learners is ELPA (English Language Proficiency Act) funds and Title III. ELPA funding is determined by the prior year's October Count, which means schools will neither receive ELPA nor Title III funding in their first year. ELPA funds are designed to support the requirement for schools to provide evidence based English language proficiency programs for all English language learners. ELPA funding is distributed annually on a per pupil basis. ELPA funds are to be used to:

1. Provide evidence-based English language development programs designed to develop English learners' English language proficiency while enabling them to achieve and maintain grade level performance in academic content and
2. Identify and assess English learners

Support Program funds under ELPA are to be used to:

1. Provide effective professional development activities related to teaching English learners and
2. Expand programs to assist students who have at any time been identified as an English learners in achieving greater content proficiency

Title III is a supplemental grant from the Federal government that is designed to improve and enhance the education of English learners in becoming proficient in English, as well as meeting the Colorado Academic Content standards. The previous Student October count informs Title III allocations. Title III supplemental monies must only be used to provide additional services, staff, programs, or materials that are not provided with State or local resources absent federal funds. These federal funds cannot pay for resources that would otherwise be purchased with State and/or local funds.

Year 0 Activities for ELL

- Develop and submit school's English Language Development plan
- Determine which staff will act as the ELL coordinator and a plan for their training
- Plan for start of school training for staff on English Language Learners

CHAPTER 10: PRESCHOOL & CPP

Preschool Development

Preschools are unique in that they are supported and overseen by both the Colorado Department of Education (CDE) and the Colorado Department of Human Services (CDHS). The processes required for establishing a preschool can be broken down into a series of steps:

1. Ensure your school's governing documents and contracts with the Charter School Institute include authorization of a preschool within the charter.
2. Acquire a childcare [license](#) through the [Office of Early Childhood at the Colorado Department of Human Services](#). A [directory](#) provided by CDHS identifies whom to contact and the supporting agencies according to county, since supports and services are funneled through the local county where the preschool resides.
3. Once a school has their childcare license, they can begin the rating process with [Colorado Shines](#), Colorado's Early Childhood Quality Rating & Improvement System.

Colorado Preschool Program

Some schools elect to participate in the [Colorado Preschool Program](#) (CPP) since it offers additional funding for qualifying students. CPP is a state-funded early childhood education program administered by CDE to provide opportunities for young children who are at risk for starting elementary school unprepared. CPP does have specific requirements regarding licensing, class size and ratios, service hour requirements, program quality criteria, assessment, staff development, family involvement and support services, and program evaluation that should be considered when deciding to become a participating member. This [guidance document](#) provides information on the guidelines.

In addition, CSI is required to have a District Advisory Council made up of participating CPP schools within the portfolio. This group provides the oversight for the CPP program at CSI. If a school wishes to participate in CPP, they must follow these steps:

1. Once a pre-school has been approved, has their childcare license, and their Colorado Shines rating, the school will need to apply to become part of the CPP program through the CSI District Advisory Council's Request for Proposal process.
2. The Council will then vote on the application. Once a school is approved, the school becomes a participating member of the District Advisory Council.
3. The school will then receive CPP allocations the following year according to the Council's slot allocation formula.

It should be acknowledged that the process of starting a preschool and becoming a part of CPP does take a significant amount of time as a result of the various oversight entities that are involved. It is in the best interest of the school considering to begin planning processes as early as possible and to connect with Nick Stachokus, CSI Student Service Improvement Specialist, at the onset of the planning process.

CHAPTER 11: SCHOOL NURSING & HEALTH SERVICES

CSI schools are required to develop a plan for providing [essential health services](#) as required by [state and federal legislation and policy](#). Some key plan elements include, but are not limited to, providing separate rooms or areas for emergency use in providing care for persons who are ill, or suspected of having communicable diseases; developing policies and procedures for collecting and maintaining health and immunization information; developing procedures for storing and administering medication; and employing or contracting with a registered nurse who holds both a CDE School Nurse license and a Colorado Department of Regulatory Agencies (DORA) license.

Throughout the school year, the school nurse follows the scope and standards of practice as outlined in the [Nurses Practices Act](#) to provide care coordination for students with health needs, including routine care, emergency response, screenings for hearing and vision, health evaluations for exceptional students (IEP or 504). A school nurse may delegate specific nursing tasks to unlicensed school staff, provided the appropriate delegation protocol is followed.

Year 0 Activities

- Ensure that your facility meets Colorado Department of Public Health and Environment rules and regulations for health service [6CCR1010-6.13](#)
- Budget for school nursing services and supplies
- Develop School Nurse job description and begin recruiting
- Develop policies for wellness, administration of medication, allergy and anaphylaxis, reporting child abuse
- Develop procedures to implement all mandatory components of the Colorado Department of Education [essential health services guidelines](#)
- Develop health and medical records management system, including procedures for communicating immunization requirements to parents and collecting immunization records and health forms upon enrollment
- Refer to the [CDE School Nurse Calendar](#) to develop procedures and timelines for conducting mandatory health and vision screenings
- Purchase basic first aid equipment and medical supplies
- Hire or contract with licensed School Nurse (waiver to licensure does not apply) and have them attend the [CDE School Nurse Orientation](#) in July
- Plan for start of school professional development that may include confidentiality policy regarding health information, training for delegation of nursing activities, field trips for students with health issues, CPR and First Aid, Standard Precautions

CHAPTER 12: CTE, CONCURRENT ENROLLMENT & ASCENT PROGRAMS

CAREER & TECHNICAL EDUCATION (CTE) PROGRAMS

Colorado Career and Technical Education (CTE) provides quality educational programs emphasizing core academic content, postsecondary & workforce readiness (PWR) competencies, technical skills, and seamless transition to further education or employment. The Colorado Community College System (CCCS) is the State Educational Agency that oversees CTE Programming. Colorado Charter School Institute (CSI) operates as the Local Educational Agency (LEA) on behalf of all CSI Charter Schools. CTE Programs in Colorado are supported through the Carl D. Perkins Career and Technical Education Improvement Act of 2006 (Perkins Act) and the Colorado Career and Technical Act, Article 8, Title 23 of the Colorado Revised Statutes (CTA). CSI manages the consolidated application process and acts as Fiscal Agent for Perkins and CTA funds.

Over the last 40 years, state appropriations for CTA have dropped proportionately to the dramatic increase of the actual cost of CTE programs. In 2014-15, the General Assembly provided only 25 percent of the actual cost of CTE programs. Perkins federal funding is intended to supplement existing CTE programs and cannot supplant state and local fund sources. Schools wishing to start a CTE program should expect to budget at least 75% of the cost of the proposed program from PPR and other local funds.

Eligible Schools

Secondary Schools (grades 7-12) can submit applications for CTE Program Approval. Schools with approved programs are eligible for funding.

- Programs for 7th and 8th graders can receive CTA funds only.
- Programs for 9th – 12th graders can receive both CTA and Perkins funds.

Comprehensive Guidance on Career & Technical Education Programming can be found at the [CCCS CTE Website](#).

Developing a CTE Program

During Year 0, the founding team should review the details of the CTE program approval process in the [CTE Administrators' Handbook](#) and convene an advisory committee with 51% of voting membership from business and industry occupations related to the CTE program the school wishes to pursue. The Advisory Committee develops a five-year long term plan for CTE programming at the school.

Next, the school works with the CSI School Programs Specialist and the CCCS Program Director to complete a Plan of Study template which describes the pathway of courses students are offered during the program and how the program articulates with post-secondary education. The school then completes the online application for program approval. Programs must be approved by CCCS prior to May 31st.

During June, the school will complete a strategy based budget for the initial school year and work to hire an instructor who holds the required CDE license for the particular CTE program. The waiver to teacher licensing does not apply to CTE programming. Schools may only be

reimbursed for program expenses incurred while a licensed instructor with the appropriate credential is teaching the program.

CONCURRENT ENROLLMENT & ASCENT PROGRAMS

In May 2009, the Colorado State Legislature passed House Bill 09-1319 and Senate Bill 09-285, the Concurrent Enrollment Programs Act. The act created the concurrent enrollment program, defined as, “the simultaneous enrollment of a qualified student in a local education provider (LEP) and in one or more postsecondary courses, including academic or career and technical education courses, which may include course work related to apprenticeship programs or internship programs, at an institution of higher education.”

The collective intent of the Concurrent Enrollment Programs Act is to:

- Broaden access to and improve the quality of concurrent enrollment programs
- Improve coordination between institutions of secondary education and institutions of higher education
- Ensure financial transparency and accountability

Beyond coordinating and clarifying the existing concurrent enrollment programs, the bill also creates the “5th year” ASCENT program for students to continue participating in concurrent enrollment for one year following their 12th grade year. Concurrent enrollment programs provide high school students with the opportunity to enroll in postsecondary courses and earn credit at no cost to them for tuition. Colorado data show that students in concurrent enrollment programs are more likely to enroll in postsecondary education, have higher postsecondary grade point averages and retention rates and a decreased need for remediation.

For the purposes of Concurrent Enrollment and ASCENT, Institute Charter Schools are considered the local education provider (LEP).

The [CDE Concurrent Enrollment website](#) contains additional information and links to concurrent enrollment statute and rule.

Funding

College tuition is separated into two parts in Colorado: the student share of tuition and the College Opportunity Fund (COF) stipend. Schools use per pupil revenue (PPR) to pay the tuition for the postsecondary courses at the resident community college rate directly to the Institute of Higher Education (IHE) on behalf of the student, or if the School is located outside the boundaries of every community college service area, the School pays the resident tuition rate of the nearest Colorado public institution of higher education [C.R.S 22-35-105(3)]. See the [Department of Higher Education policy outlining service areas of Colorado public IHEs](#), and Colorado Community College System [service area map by county](#). Students also apply for and authorize the COF stipend to pay that portion of their tuition. All CE and ASCENT students are eligible for the COF stipend (at IHEs which receive COF funding), but if they do not apply or for some reason do not receive it, the IHE may charge students the stipend amount.

More information can be found on the summary of [funding determinations for CE students](#), as well as the [Student October Count Resource Guide](#).

Year 0 Activities

Developing Concurrent Enrollment programs

- Enter into a Cooperative Agreement with an Institute of Higher Learning (IHL)

- Create and make publicly available a standard Concurrent Enrollment Application for use by a qualified student
- Develop [Individual Career and Academic Plan \(ICAP\)](#) policy and procedures

Additional activities for ASCENT programs

- Determine any school defined standards for eligibility/readiness (e.g. appropriate GPA, meeting LEP graduation requirements, etc.) that may exceed the ASCENT program eligibility requirements for student
- Develop a timeline and application process for students to sign up for ASCENT program, prior to February 1st of the 12th grade year
- Create a system to prioritize students for ASCENT participation in the case that the number of qualified students exceeds the number of funded slots
- Create a policy for students to participate in graduation. Diploma may not be awarded, but a certificate of attendance or completion may be awarded at high school graduation

Colorado Department of Education provides a number of [resources](#) to assist in developing the required policies.

CHAPTER 13: OTHER RESOURCES

Colorado Department of Education Choice and Innovation Unit

The [Choice & Innovation Unit](#) at CDE offers resources and support for charter schools, schools and districts seeking innovation status, and manages the CCSP (Colorado Charter School Program) grant. The Schools of Choice Office hosts events and trainings for school leaders and administrators. Some of the events include: Charter School Boot Camp, CCSP Charter School Grant Writers Boot Camp, Board Fundamentals (formerly Regional Board Trainings), Administrator Mentoring Cohort (AMC), and Regional Luncheons. The Schools of Choice Office also sends out a weekly newsletter that provides information on upcoming trainings, changes in legislation, and policy updates. Consider joining the [Charter School Listserv](#) to receive updates.

Colorado League of Charter Schools

The [Colorado League of Charter Schools](#) is a non-profit, membership organization dedicated to supporting the charter schools in the state. The League offers a variety supports for developing charters, newly approved charter schools, and existing charter schools. The League's Year 0 supports include checklists, calendars, access to their job board, one-on-one meetings, events, and new school [recorded webinars](#).

To begin receiving email updates related to Charter School Business Management, Charter news articles, Legislative updates, and Professional Development opportunities, consider [subscribing](#) to the League's e-newsletters.

Getting Smart Services

[Getting Smart Services](#) is a learning design firm focused on innovations in learning. Their website contains a wealth of resources to support school development in the areas of communications & social media, marketing & growth, multimedia content, professional learning experiences, strategic design, and project design & management. Their [100 Tips & Insights for Opening Great New Schools](#) whitepaper is a helpful toolkit for school developers.

Employers Council Membership

As a CSI school, you have access to our Employers Council membership which is a great resource to help you manage critical Human Resources and Employment Law issues. Your school is able to identify 2-3 people that you would like added to the membership. Please reach out to CSI's Human Resources and Accounts Payable Manager, Allegra Matus (AllegraMatus@csi.state.co.us) to be added. Once your membership is complete, you can call the Employers Council at phone #303-839-5177 with your HR & Employment Law questions.