



# 2021 Expansion Amendment Training

Charter School Authorizing  
and Administration Division



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# Overview: Expansion Amendment Training

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# Charter School – Amendments Webpage



## Charter School - Amendments

This page covers the process for submitting charter amendments. An amendment is any change to the terms of an open-enrollment charter. See [19 TAC §100.1033\(b\) - Types of Amendments](#) for more information.

### Types of amendments include:

[Expansion Amendments](#);  
[Non-Expansion Amendments](#); and  
[High-Quality Campus Designation](#).

Also included on this page is the [Campus Number Request Form](#).

### Contacts for Amendment Requests

Please submit all amendment requests or questions regarding amendment requests to [CharterAmendments@tea.texas.gov](mailto:CharterAmendments@tea.texas.gov).

If you need to send large files, please use our [secure ShareFile service](#).

### Expansion Amendments

Pursuant to SB 668, a charter holder may submit a request for approval for an expansion amendment up to 18 months before the date on which the expansion will be effective. A request for approval of an expansion amendment does not obligate the charter holder to complete the proposed expansion.

An expansion amendment is an amendment that permits a charter school to:

- extend the grade levels it serves;
- add an additional campus;
- add an additional site;
- change its geographic boundaries; or
- increase its maximum allowable enrollment.

See [19 TAC §100.1033\(b\)\(9\) Expansion Amendment Standards](#) and [19 TAC §100.1033\(b\)\(10\) Expansion Amendments](#) for more information.

[Expansion Amendment Request Form \(PDF, 2,989 KB\)](#) - Updated January 5, 2021



<https://tea.texas.gov/texas-schools/texas-schools-charter-schools/charter-school-amendments>

(9) Expansion amendment standards. An expansion amendment is an amendment that permits a charter school to increase its maximum allowable enrollment, extend the grade levels it serves, change its geographic boundaries, or add a campus or site.

(A) In addition to the requirements of this subsection, the commissioner may approve an expansion amendment only if:

(i) the expansion will be effective no earlier than the start of the fourth full school year at the affected charter school. This restriction does not apply if the affected charter school has a rating of "academically acceptable" as defined by §100.1001(26) of this title (relating to Definitions) as its most recent rating and is operated by a charter holder that operates multiple charter campuses and all of that charter holder's most recent campus ratings are "academically acceptable" as defined by §100.1001(26) of this title;

(ii) the amendment request under paragraph (1) of this subsection is received no earlier than the first day of January and no later than the first day of March, not to exceed 18 months preceding the effective date of the expansion;

(iii) the most recent district rating for the charter school is "academically acceptable" and the most recent campus rating for at least 90% of the campuses operated under the charter school is "academically acceptable" as defined by §100.1001(26) of this title;

(iv) the most recent district financial accountability rating for the charter school in the Financial Integrity Rating System of Texas (FIRST) for Charter Schools is "satisfactory" as defined by §100.1001(27) of this title;

(v) the charter school has an accreditation status of Accredited;

(vi) the most recent designation for the charter school under the CSPF is "Tier 1" or "Tier 2" as defined by §100.1010 of this title;

(vii) before voting to request an expansion amendment, the charter holder governing board has considered a business plan, has determined by majority vote of the board that the growth proposed is financially prudent relative to the financial and operational strength of the charter school, and includes such a statement in the board resolution. Upon request by the TEA, the business plan must be filed within ten business days. The business plan must be comprised of the following components:

(I) a statement discussing the need for the expansion;

(II) a statement discussing the current and projected financial condition of the charter holder and charter school;

(III) an unaudited statement of financial position for the current fiscal year;

(IV) an unaudited statement of financial activities for the current fiscal year;

(V) an unaudited statement of cash flows for the current fiscal year;

(VI) a pro forma budget that includes the costs of operating the charter school, including the implementation of the expansion amendment;

(VII) a statement or schedule that identifies the assumptions used to calculate the charter school's estimated Foundation School Program revenues;

(VIII) a statement discussing the use of debt instruments to finance part or all of the charter school's incremental costs;

# Expansion Amendment Request Form

# Review Document



## Charter School Expansion Amendment Request Form

Texas Education Agency [charteramendments@tea.texas.gov](mailto:charteramendments@tea.texas.gov)  
 Division of Charter School Authorizing and Administration (512) 463-9575

Name of Charter:  County-District Number:   
 Name of Charter Holder:  Requested Effective Date:

Expansion amendments may be approved only if applicants meet all expansion criteria as indicated in 19 Texas Administrative Code (TAC) §100.1033. The charter school must have operated in Texas for a minimum of three consecutive years and must have "Accredited" status on the most recent rating.

A separate expansion amendment form must be completed, signed, and submitted for each campus the charter school is requesting. All other types of expansion requests may be combined in a single form. Prior to the submission of an amendment request, the charter school governing board and superintendent must engage in and demonstrate that a Growth Analysis Plan (GAP) has been conducted as reflected in Section II below.

Completed amendment requests must include this amendment form including the signed attestations found at the end of the form, a signed and dated board resolution, and all applicable attachments.

### SECTION I – Requested Expansion Part 1

Check the appropriate box(es) for the expansion requested.

1.  ADD ADDITIONAL CAMPUS-complete responses under Section I, Part 2, item 1.
2.  ADD ADDITIONAL GRADE LEVEL(S)-complete responses under Section I, Part 2, item 2.
3.  EXPAND GEOGRAPHIC BOUNDARY-complete responses under Section I, Part 2, item 3.
4.  INCREASE MAXIMUM STUDENT ENROLLMENT-complete responses under Section I, Part 2, item 4.

### SECTION I – Requested Expansion Part 2

#### 1. Additional Campus: (complete items 1a.- 1j. for each campus expansion request)

- a. Is the proposed campus within the currently approved geographic boundary of the charter?  
 If no, check the GEOGRAPHIC BOUNDARY EXPANSION box in #3 above.
- b. What is the proposed address of the requested campus?  
  
 (Approval of the requested campus does not imply TEA approval of the proposed address.)
- c. What grade levels will be served at the proposed campus at capacity?
- d. What is the estimated target number of students to be served at the proposed campus at capacity?
- e. What is the estimated target number of students to be served in tested grades at the proposed campus at capacity?

## Charter Expansion Amendment Request Review Document

Expansion amendments may be approved only if applicants meet all expansion criteria as indicated in | [19 Texas Administrative Code \(TAC\) §100.1033.](#)

*Failure to meet the minimum eligibility requirements and/or failure to submit the requested items results in an incomplete form.*

Corresponding Question on Amendment Form	Requirement	Review
Section I, Part 2, Item 1h  <i>(for additional campus expansion requests only if the campus will be evaluated under AEA procedures)</i>	<b>AEA Accountability</b> Provide an explanation how the campus will qualify for evaluation under AEA accountability measures.  <i>A Meets Standard response should demonstrate that the school meets all current criteria for AEA designation.</i>	<input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet <input type="checkbox"/> N/A
Section I, Part 2, Item 1j  <i>(for additional campus requests only)</i>	<b>Evidence of Impact Notification</b> Provide evidence that the charter school has notified relevant districts of the potential impact of the campus expansion. <b>[Attachment C: Evidence of Impact Notification(s) to relevant school district(s)]</b>  <i>A Meets Standard response demonstrates via certified mail documented by return receipt, that each school district affected by the expansion was sent a notice to the district's central office of the proposed location and, if available, the address of any new campuses or sites, including proposed grade levels to be served and projected maximum enrollment. [19 TAC §100.1033(b)(10)(D)(iii)]</i>	<input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet <input type="checkbox"/> N/A
Section I, Part 2, Item 2f  <i>(for grade-level expansion requests only)</i>	<b>TEKS-Aligned Scope and Sequence</b> Attach a TEKS-aligned scope and sequence for the corresponding grade levels requested in reading/ELA, math, science, social studies, fine arts, PE, technology applications, and any LOTEs as outlined in 19 TAC §74 as well as an analysis of the curricular materials that will be used and the rationale for how those materials were selected for each of the proposed grade levels. <b>[Attachment D: Scope and Sequence and accompanying documentation]</b>  <i>A Meets Standard response includes:</i> <ul style="list-style-type: none"> <li>• A TEKS-aligned scope and sequence has been created for each grade level requested in each subject area taught in those grade levels.</li> <li>• An analysis of the curriculum materials to be used that should describe the process by which the materials were selected.</li> <li>• Any other factors that demonstrate that the materials chosen will provide a basis for quality TEKS-based instruction in all subjects in the expanded grade levels.</li> </ul>	<input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet <input type="checkbox"/> N/A

# SECTION I – Requested Expansion

## Part 1

- Add Additional Campus

Complete responses under

- Section I, Part 2, item 1



- Add Additional Grade Level(s)

Complete responses under

- Section I, Part 2, item 2



- Expand Geographic Boundary

Complete responses under

- Section I, Part 2, item 3



- Increase Maximum Enrollment

Complete responses under

- Section I, Part 2, item 4



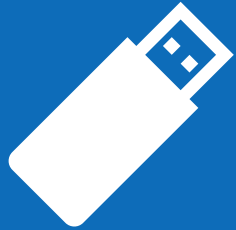
[19 TAC §100.1033\(b\)\(10\) – Expansion Amendments](#)

(10) Expansion amendments.

- (A) Maximum enrollment. In addition to the requirements of paragraph (9)(A) of this subsection, the commissioner may approve an expansion amendment request seeking to increase maximum allowable enrollment not more than once each calendar year.
- (B) Grade span. In addition to the requirements of paragraph (9)(A) of this subsection, the commissioner may approve an expansion amendment request seeking to extend the grade levels it serves only if it is accompanied by appropriate educational plans for the additional grade levels in accordance with Chapter 74, Subchapter A, of this title (relating to Required Curriculum), and such plan has been reviewed and approved by the charter governing board.
- (C) Geographic boundary. In addition to the requirements of paragraph (9)(A) of this subsection, the commissioner may approve an expansion amendment request seeking to expand the geographic boundaries of the charter school only if it is accompanied by evidence of notification, electronic or otherwise, to the relevant district(s).
- (D) Additional campus. In addition to the requirements of paragraph (9)(A) of this subsection, the commissioner may approve an expansion amendment request seeking to add a new campus only if it meets the following criteria:
  - (i) the charter holder has operated at least one charter school campus in Texas for a minimum of three consecutive years;
  - (ii) the charter school under which the proposed new campus will be assigned currently has at least 50% of the student population in grades assessed under TEC, Chapter 39, Subchapter B. For charter schools serving students in prekindergarten, the charter school may include the students in prekindergarten to count toward the 50% requirement if the charter school can demonstrate acceptable performance on a commissioner-approved prekindergarten assessment or monitoring tool as determined under §102.1003 of this title (relating to High-Quality Prekindergarten Program) and the addition of the prekindergarten students meets the 50% threshold; and
  - (iii) the charter holder has provided evidence, via certified mail documented by return receipt, that each school district affected by the expansion was sent a notice to the district's central office of the proposed location and, if available, the address of any new campuses or sites, including proposed grade levels to be served and projected maximum enrollment.
- (E) Additional site. In addition to the requirements of paragraph (9)(A) of this subsection, the commissioner may approve an expansion amendment request seeking to add a new site under an existing campus only if it meets the following criteria:
  - (i) the charter school campus under which the proposed new site will be assigned currently has at least 50% of the student population in grades assessed under TEC, Chapter 39, Subchapter B. For charter school campuses serving students in prekindergarten, the charter school may include the students in prekindergarten to count toward the 50% requirement if the charter school can demonstrate acceptable performance on a commissioner-approved prekindergarten assessment or monitoring tool as determined under §102.1003 of this title and the addition of the prekindergarten students meets the 50% threshold; and
  - (ii) the site will be located within 25 miles of the campus with which it is associated.



# Section I – Requested Expansion, Part 2: Add Additional Campus



## Attachment C: Evidence of Impact Notification(s)

Required for  
campus  
expansion  
requests only.

1. **Additional Campus:** *(complete items 1a.- 1j. for each campus expansion request)*

a. Is the proposed campus within the currently approved geographic boundary of the charter?  
If no, check the GEOGRAPHIC BOUNDARY EXPANSION box in #3 above.

b. What is the proposed address of the requested campus?  
  
*(Approval of the requested campus does not imply TEA approval of the proposed address.)*

c. What grade levels will be served at the proposed campus at capacity?

d. What is the estimated target number of students to be served at the proposed campus at capacity?

e. What is the estimated target number of students to be served in tested grades at the proposed campus at capacity?

f. Is the proposed campus a residential facility?  YES  NO

g. If the amendment is approved, is a new campus number required?  YES  NO  
If no, to which campus number will the new site be assigned?

h. If a new campus number is requested, will this campus be evaluated under standard accountability measures?  YES  NO  
If no, submit an explanation as to how the campus will qualify for evaluation under alternative education accountability (AEA) measures.  
  
*(Must meet AEA criteria and apply during AEA registration period.)*

i. If a new campus number is requested, what is the proposed name of the new campus?

j. Provide evidence that the charter school has notified relevant districts of potential impact (**Attachment C: Evidence of Impact Notification(s) to relevant district(s)**)

❖ *A certificate of occupancy with an "E" occupant code or equivalent certificate must be obtained and submitted to the agency for review and approval prior to serving students.*

<p><b>Section I, Part 2, Item 1h</b></p> <p><i>(for additional campus expansion requests only if the campus will be evaluated under AEA procedures)</i></p>	<p><b>AEA Accountability</b> Provide an explanation how the campus will qualify for evaluation under AEA accountability measures.</p> <p><i>A Meets Standard response should demonstrate that the school meets all current criteria for AEA designation.</i></p>	<p><input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet <input type="checkbox"/> N/A</p>
<p><b>Section I, Part 2, Item 1j</b></p> <p><i>(for additional campus requests only)</i></p>	<p><b>Evidence of Impact Notification</b> Provide evidence that the charter school has notified relevant districts of the potential impact of the campus expansion. <b>[Attachment C: Evidence of Impact Notification(s) to relevant school district(s)]</b></p> <p><i>A Meets Standard response demonstrates via certified mail documented by return receipt, that each school district affected by the expansion was sent a notice to the district's central office of the proposed location and, if available, the address of any new campuses or sites, including proposed grade levels to be served and projected maximum enrollment. [19 TAC §100.1033(b)(10)(D)(iii)]</i></p>	<p><input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet <input type="checkbox"/> N/A</p>



[19 TAC §100.1033\(b\)\(10\)\(D\) – Additional Campus](#)  
[19 TAC §100.1033\(b\)\(10\)\(E\) – Additional Site](#)



**Attachment D:  
Scope and  
Sequence**

*Required for  
grade-level  
expansion  
requests only.*

**2. Additional Grade Levels (complete items 2a.- 2f. for grade-level expansion requests):**

a. Current approved grade levels:

b. Grade levels requested:

Early Ed (3)  Pre-K (4)  Kindergarten  1  2  3  4  5  6  7  8  9  10  11  12

c. Campuses to serve the proposed grade levels:

d. Estimated target number of students to be served in grades that will be evaluated under the accountability rating system:

e. Estimated target percentage of students, including the grade levels to be added, that will be evaluated under the accountability rating system?

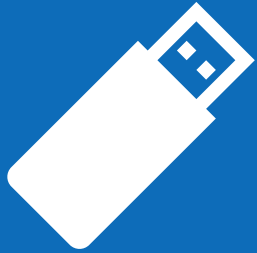
f. Attach a TEKS-aligned scope and sequence for the corresponding grade levels requested in reading/ELA, math, science, social studies, fine arts, PE, technology applications, and any LOTE as outlined in 19 TAC §74 as well as an analysis of the curricular materials that will be used and the rationale for how those materials were selected for each of the proposed grade levels. (**Attachment D: Scope and Sequence and accompanying documentation**)



[19 TAC §100.1033\(b\)\(10\)\(B\) – Grade Span](#)

<p><b>Section I, Part 2, Item 2f</b></p> <p><i>(for grade-level expansion requests only)</i></p>	<p><b>TEKS-Aligned Scope and Sequence</b></p> <p>Attach a TEKS-aligned scope and sequence for the corresponding grade levels requested in reading/ELA, math, science, social studies, fine arts, PE, technology applications, and any LOTE as outlined in 19 TAC §74 as well as an analysis of the curricular materials that will be used and the rationale for how those materials were selected for each of the proposed grade levels.</p> <p><b>[Attachment D: Scope and Sequence and accompanying documentation]</b></p> <p><i>A Meets Standard response includes:</i></p> <ul style="list-style-type: none"> <li>• A TEKS-aligned scope and sequence has been created for each grade level requested in each subject area taught in those grade levels.</li> <li>• An analysis of the curriculum materials to be used that should describe the process by which the materials were selected.</li> <li>• Any other factors that demonstrate that the materials chosen will provide a basis for quality TEKS-based instruction in all subjects in the expanded grade levels.</li> </ul>	<p><input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet <input type="checkbox"/> N/A</p>
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# Section I – Requested Expansion, Part 2: Expand Geographic Boundary



## Attachment E: Evidence of Notification to Districts

Required for  
geographic  
boundary  
expansion  
requests  
only.

### 3. Geographic Boundary: (complete 3a.-3b. for geographic expansion requests)

- a. List, in alphabetical order, the proposed independent school districts (ISDs) to be added to the charter’s currently approved geographic boundary:

- b. Provide evidence of notification(s) to the ISD(s) listed above of the geographic boundary request(s).  
(Attachment E: Evidence of Notification to Districts)

<p><b>Section I, Part 2, Items 3a and b</b> <i>(for geographic boundary requests)</i></p>	<p><b>Evidence of Notification to Districts</b> Provide evidence of notification(s) to the ISD(s) listed in alphabetical order in Item 3a of the geographic boundary request(s). <i>[Attachment E: Evidence of Notification to Districts]</i></p> <p><i>A Meets Standard response provides evidence of notification, electronic or otherwise, to the relevant district(s).</i> <i>[19 TAC §100.1033(b)(10)(C)]</i></p>	<p><input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet <input type="checkbox"/> N/A</p>
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[19 TAC §100.1033\(b\)\(10\)\(C\) – Geographic Boundary](#)

# Section I – Requested Expansion, Part 2: Maximum Student Enrollment



**4. Maximum Student Enrollment: (complete 4a.-4b. for maximum enrollment expansion requests)**

a. Current approved maximum enrollment:

b. Requested maximum student enrollment.

❖ *Only one maximum student enrollment increase is allowed during each calendar year.*

[19 TAC §100.1033\(b\)\(10\)\(A\) – Maximum Enrollment](#)





## Resources

The following links include more forms and documents used when submitting amendments:

- [Assurances Regarding Charter Schools Serving Students in Residential Facilities \(PDF, 17 KB\)](#);
- [Business Plan Components \(PDF, 85 KB\)](#);
- [Impact Statement - Form \(726 KB\)](#); and
- [Impact Statement To District \(20 KB\)](#).

<https://tea.texas.gov/texas-schools/texas-schools-charter-schools/charter-school-amendments>

# Section II – Growth Analysis Plan, Part 1: Justification and Rationale for Expansion

**Complete Section II, Part 1 in its entirety for all expansion requests.**

## 1. Rationale for Proposed Expansion – Narrative response limited to 500 words

Describe the perceived need for the charter expansion in the community in which the charter proposes to expand. Describe the information which leads the charter school to believe there is a demand or need for the proposed expansion. Include in the response a detailed rationale for the proposed expansion.



## Section II, Part 1, Item 1

*(for all expansion requests)*

## Rationale for Proposed Expansion

Describe the perceived need for the charter expansion in the community in which the charter proposes to expand. Describe the information which leads the charter school to believe there is a demand or need for the proposed expansion. Include in the response a detailed rationale for the proposed expansion.

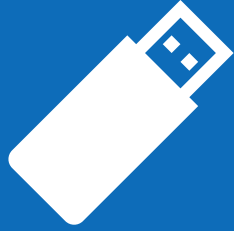
*A Meets Standard response could include the followings:*

- Evidence that the charter's current percentage of students at the "meets" or "exceeds" standard performance level is at a rate higher than the current percentage in the proposed expansion area;
- Evidence through interest surveys and other canvassing activities that there is demand for the academic programs and activities provided by the charter;
- Evidence that the charter has one or more measures of teacher quality including teacher turnover rates, average years of experience, highest degree held, average teacher salary by years of experience that exceed those same measures in the proposed expansion area;
- Evidence-based research, by conducting an A-F rating comparison analysis of the charter's current performance with schools in the proposed expansion area, that the academic performance of the new campus will meet or exceed the academic performance of campuses in the proposed expansion area;
- Evidence that the charter offers a program or a unique aspect of a program that is not offered by a nearby district campus;
- Evidence that the charter has conducted a waitlist analysis;
- Other evidence that demonstrates demand or need for the charter expansion.

Meets Standard  
 Does Not Meet

# Section II – Growth Analysis Plan, Part 1: Board Resolution & Board Consideration

**Complete Section II, Part 1 in its entirety for all expansion requests.**



**Attachment A:  
Board  
Resolution**

**Attachment B:  
Agenda and  
Minutes**

*Required for  
all requests.*



## 2. Board Resolution

Provide a resolution adopted by the governing body of the charter holder, with printed names and signatures, demonstrating that a quorum of the members voted in favor of amending the charter in a duly called public meeting. **(Attachment A: Board resolution)**

- ❖ *The board resolution should include a statement indicating that the charter holder governing body has considered a business plan and has determined by majority vote of the board that the growth proposed is prudent. Include a list of current names if different from those submitted in the most recent Annual Governance Report.*

## 3. Board Consideration

Provide a board agenda and minutes that show all elements linked to the proposed expansion, as included in the expansion application, were considered by the governing board in a duly called public meeting. **(Attachment B: Agenda and minutes)**

- ❖ *Draft minutes will be acceptable in lieu of final, board-approved minutes.*



<p>Section II, Part 1, Item 2</p> <p><i>(for all expansion requests)</i></p>	<p><b>Board Resolution</b> <b>[Attachment A: Board Resolution]</b></p> <p>Provide a resolution adopted by the governing body of the charter holder, with printed names and signatures, demonstrating that a quorum of the members voted in favor of amending the charter in a duly called public meeting. If board members have changed from those submitted in the most recent Annual Governance Report, provide a current list of names of board members.</p>	<p><input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet</p>
	<p><i>A Meets Standard response should include:</i></p> <ul style="list-style-type: none"> <li>• <i>A statement in the resolution indicating that that a quorum of the members voted in favor of amending the charter in a duly called public meeting;</i></li> <li>• <i>A statement in the resolution that the charter holder governing body has considered a business plan and has determined by majority vote of the board that the growth proposed is prudent.</i></li> </ul>	
<p>Section II, Part 1, Item 3</p> <p><i>(for all expansion requests)</i></p>	<p><b>Board Consideration</b> <b>[Attachment B: Agenda and minutes]</b></p> <p>Provide a board agenda and minutes that show all elements linked to the proposed expansion, as included in the expansion application, were considered by the governing board in a duly called public meeting. Draft minutes will be acceptable in lieu of final, board-approved minutes.</p> <p><i>A Meets Standard response must include:</i></p> <ul style="list-style-type: none"> <li>• <i>the agenda and minutes as described in the requirement.</i></li> </ul>	<p><input type="checkbox"/> Meets Standard <input type="checkbox"/> Does Not Meet</p>


# Section II – Growth Analysis Plan, Part 2: Academic, Financial, & Operational Capacity Indicators

**Complete Section II, Part 2 in its entirety for all applicable expansion requests.**

Central Office capacity to support proposed expansion(s) – *Narrative response limited to 250 words for each section.*



**1. Model** – For **additional campus requests only**, describe the core elements of the school model and the steps taken to ensure that the school model as outlined in the charter contract will be faithfully replicated at the proposed campus(es).

<p><b>Section II, Part 2, Item 1</b></p> <p><i>(for additional <b>campus</b> requests only)</i></p> 	<p><b>Model</b></p> <p>Describe the core elements of the school model and the steps taken to ensure that the school model as outlined in the charter contract will be faithfully replicated at the proposed campus(es).</p> <p><i>A Meets Standard response:</i></p> <ul style="list-style-type: none"> <li>• <i>Clearly articulates core features or elements of the school model including but not limited to common curriculum and instruction elements, school culture, parent engagement strategies, supports for safe and supportive environments, and other core elements of the charter model; and</i></li> <li>• <i>Describes specific strategies and activities that will be used to ensure fidelity to the school model at the expanded campus(es) including a description of standardized protocols that will be implemented to ensure faithful replication of the core elements of the school model.</i></li> </ul>	<p><input type="checkbox"/> <b>Meets Standard</b></p> <p><input type="checkbox"/> <b>Does Not Meet</b></p> <p><input type="checkbox"/> <b>N/A</b></p>
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# Section II – Growth Analysis Plan, Part 2: Academic, Financial, & Operational Capacity Indicators

**Complete Section II, Part 2 in its entirety for all expansion requests.**

Central Office capacity to support proposed expansion(s) – *Narrative response limited to 250 words for each section.*

**2. a. Talent: Capacity** - For all expansion requests, describe the projected human resource capacity (the number of additional teachers and administrative support) required to implement the proposed expansion. This should include a reasonable number of administrators needed as well as teachers needed to comply with the charters identified teacher-student ratio to successfully implement the expansion.

<p><b>Section II, Part 2, Item 2a</b></p> <p><i>(for all expansion requests)</i></p>	<p><b>Talent: Capacity</b></p> <p>Describe the projected human resource capacity (the number of additional teachers and administrative support) required to implement the proposed expansion. This should include a reasonable number of administrators needed as well as teachers needed to comply with the charters identified teacher-student ratio to successfully implement the expansion.</p> <p><i>A Meets Standard response should clearly outline the charter's approved student-teacher ratio and list:</i></p> <ul style="list-style-type: none"> <li><i>The number of teachers required to replicate the approved ratio;</i></li> <li><i>Any additional teachers needed to support students with disabilities, English learners or students in other programs;</i></li> </ul>	<p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Does Not Meet</p>
	<ul style="list-style-type: none"> <li><i>Teachers needed for any special programs such as art, music, or PE;</i></li> <li><i>Any additional support staff needed; and</i></li> <li><i>The number administrators needed to support the expansion.</i></li> </ul>	



# Section II – Growth Analysis Plan, Part 2: Academic, Financial, & Operational Capacity Indicators

**Complete Section II, Part 2 in its entirety for all expansion requests.**

Central Office capacity to support proposed expansion(s) – *Narrative response limited to 250 words for each section.*

**2. b. Talent: Sourcing and Training** – For all expansion requests, describe how the charter will recruit, hire, and train the teachers and administrators needed to support the expansion. Include the timeline for completing such activities.

**Section II,  
Part 2, Item 2b**

*(for all expansion requests)*

**Talent: Sourcing and Training**

Describe how the charter will recruit, hire, and train the teachers and administrators needed to support the expansion. Include the timeline for completing such activities.

*A Meets Standard response will describe:*

- *Specific strategies that will be used to source and recruit teachers, such as job fairs, university internships, other talent partnerships, and the methods used to post and advertise job openings;*
- *The types of professional development activities that will be conducted to train teachers and administrators to ensure faithful replication of the charter model; and*
- *A detailed timeline for the completion of these activities.*

**Meets Standard**  
 **Does Not Meet**



# Section II – Growth Analysis Plan, Part 2: Academic, Financial, & Operational Capacity Indicators

**Complete Section II, Part 2 in its entirety for all expansion requests.**

Central Office capacity to support proposed expansion(s) – *Narrative response limited to 250 words for each section.*

**3. Central Office Support** – For **all expansion requests**, describe how the charter has or will increase capacity at central office to support the successful expansion of the charter school. This should include a detailed description of central office supports implemented to facilitate the expansion and considerations for additional academic, financial, and operational alignment and enhancement.



<p><b>Section II, Part 2, Item 3</b></p> <p><i>(for <b>all expansion requests</b>)</i></p>	<p><b>Central Office Support</b></p> <p>Describe how the charter has or will increase capacity at central office to support the successful expansion of the charter school. This should include a detailed description of central office supports implemented to facilitate the expansion and considerations for additional academic, financial, and operational alignment and enhancement.</p> <p><i>A Meets Standard response could include:</i></p> <ul style="list-style-type: none"> <li>• <i>A plan to hire additional staff to support expansion efforts;</i></li> <li>• <i>A plan to reallocate and/or provide additional academic, financial, or operational supports and resources towards expansion efforts;</i></li> <li>• <i>A description of any additional supports to be added to ensure cross-campus alignment and compliance with statute and rule</i></li> </ul>	<p><input type="checkbox"/> <b>Meets Standard</b></p> <p><input type="checkbox"/> <b>Does Not Meet</b></p>
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# Section II – Growth Analysis Plan, Part 2: Academic, Financial, & Operational Capacity Indicators

**Complete Section II, Part 2 in its entirety for all expansion requests.**

Central Office capacity to support proposed expansion(s) – *Narrative response limited to 250 words for each section.*

**4. Community Engagement** – For all expansion requests, describe the how the charter will, post approval, engage the community. This may include broad-based approaches such as advertising and social media, personalized approaches including community meetings and other forms of personal outreach, and stakeholder support including identifying and meeting with key community leaders.

<p><b>Section II, Part 2, Item 4</b></p> <p><i>(for all expansion requests)</i></p>	<p><b>Community Engagement</b></p> <p>Describe the how the charter will, post approval, engage the community. This may include broad-based approaches such as advertising and social media, personalized approaches including community meetings and other forms of personal outreach, and stakeholder support including identifying and meeting with key community leaders.</p> <p><i>A Meets Standard response will include:</i></p> <ul style="list-style-type: none"> <li><i>A detailed plan that outlines marketing efforts in the community, such as direct mail, TV, social media, or the newspaper; and</i></li> <li><i>A plan that outlines personal engagement strategies that could be used with interested stakeholders.</i></li> </ul>	<p><input type="checkbox"/> <b>Meets Standard</b></p> <p><input type="checkbox"/> <b>Does Not Meet</b></p>
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# Section II – Growth Analysis Plan, Part 3: Justification and Rationale for Expansion

**Complete Section II, Part 3 in its entirety for all expansion requests as applicable.**

Responses are required for all expansion requests from charter schools that received a C, D, or F on their most recent Domain III rating. *Narrative response limited to 500 words for each section.*



**1. Projected Student Population – Narrative response limited to 500 words**

Provide the estimated percentages of students in each of the Domain III student groups in the proposed expansion area, compared with student populations you are currently serving. Describe strategies and supports that will be implemented to ensure success for all student groups.

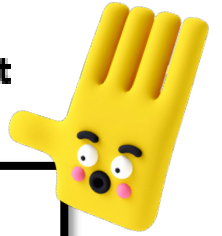
<p><b>Section III, Part 3, Item 1</b></p> <p><i>(Responses are required for <u>all</u> expansion requests from <b>charter schools</b> that received a <b>C, D, or F</b> on their most recent <b>Domain III rating</b>)</i></p>	<p><b>Projected Student Population</b></p> <p>Provide the estimated percentages of students in each of the Domain III student groups in the proposed expansion area, compared with student populations you are currently serving. Describe strategies and supports that will be implemented to ensure success for all student groups.</p> <p><i>A Meets Standard response will include:</i></p> <ul style="list-style-type: none"> <li>• <i>A description of the Domain III populations to be served;</i></li> <li>• <i>If the population of any group is significantly different (≥ 5%) from existing campuses, a description of the impact of the difference on the services to be provided, including additional instructional supports, staff training, supplemental personnel, and enhancements to school culture structures and behavioral supports.</i></li> <li>• <i>A detailed description of instructional approaches, policies, and plans designed to provide a continuum of supports to these populations.</i></li> </ul>	<p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Does Not Meet</p>
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# Section II – Growth Analysis Plan, Part 3: Justification and Rationale for Expansion

**Complete Section II, Part 3 in its entirety for all expansion requests as applicable.**

Responses are required for all expansion requests from charter schools that received a C, D, or F on their most recent Domain III rating. *Narrative response limited to 500 words for each section.*



## 2. Supports for Students with Disabilities – *Narrative response limited to 500 words*

Provide a summary of the charter’s efforts in meeting the needs of students with disabilities and Section 504 students, including an analysis of current performance, areas where growth is needed, and the specific strategies and supports that will be implemented to ensure success for these students.



<p><b>Section III, Part 3, Item 2</b></p> <p><i>(Responses are required for <u>all</u> expansion requests from <b>charter schools</b> that received a <b>C, D, or F</b> on their most recent <b>Domain III rating</b>)</i></p>	<p><b>Supports for Students with Disabilities</b></p> <p>Provide a summary of the charter’s efforts in meeting the needs of students with disabilities and Section 504 students, including an analysis of current performance, areas where growth is needed, and the specific strategies and supports that will be implemented to ensure success for these students.</p> <p><i>A Meets Standard response will include:</i></p> <ul style="list-style-type: none"> <li>• <i>The percentage of students with disabilities and Section 504 students who approach or meet grade level STAAR mastery;</i></li> <li>• <i>Identified areas for improved STAAR performance;</i></li> <li>• <i>A plan for remediating growth areas including instructional approaches aligned to student needs as outlined in IEPs and Section 504 plans, and targeted professional development to ensure consistent provision of services; and</i></li> <li>• <i>A plan to ensure that all staff are trained in providing accommodations outlined in students’ IEP or 504 documentation.</i></li> </ul>	<p><input type="checkbox"/> Meets Standard</p> <p><input type="checkbox"/> Does Not Meet</p>
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# Section II – Growth Analysis Plan, Part 3: Justification and Rationale for Expansion

**Complete Section II, Part 3 in its entirety for all expansion requests as applicable.**

Responses are required for all expansion requests from charter schools that received a C, D, or F on their most recent Domain III rating. *Narrative response limited to 500 words for each section.*



### 3. Supports for Bilingual Students/English Learners – Narrative response limited to 500 words

Provide a summary of the charter’s efforts in meeting the needs of bilingual students/English learners, including an analysis of current performance and areas where growth is needed. and the specific strategies and supports that will be implemented to ensure success for these students.



#### Section III, Part 3, Item 3

*(Responses are required for all expansion requests from **charter schools** that received a **C, D, or F** on their most recent **Domain III rating**)*

#### Supports for Bilingual Students/English Learners

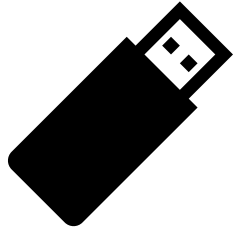
Provide a summary of the charter’s efforts in meeting the needs of bilingual students and/or English learners, including an analysis of current performance and areas where growth is needed. and the specific strategies and supports that will be implemented to ensure success for these students.

*A Meets Standard response will include:*

- *The percentage of bilingual students/English Learners who approach or meet grade level STAAR mastery;*
- *Identified areas for improved STAAR performance;*
- *A plan for remediating growth areas including instructional approaches aligned to the needs of bilingual student/English learners, and targeted professional development to ensure consistent provision of services; and*
- *A plan to ensure that all staff are trained in implementing the English Language Proficiency Standards (ELPS) and evidence of implementation in lesson planning documents.*

- Meets Standard  
 Does Not Meet

# Section III - Supplemental Requirements



## Attachment F: Compliance Information

*Required for all  
requests.*



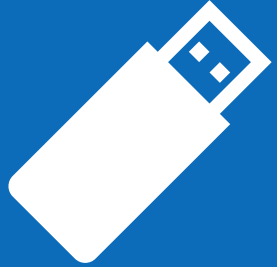
1. **Compliance Information for all Expansion Requests – as required by 19 TAC §100.1035, please include the following:**
  - a. Documentation identifying a board member's substantial interest in a business entity or in real property that relates to any charter business;
  - b. Documentation of a board member's abstentions from voting in cases of potential conflicts of interest;
  - c. Documentation, other than Annual Governance Reporting Forms, identifying family members and/or employees and/or contractors of the charter holder or charter school; **and**
  - d. Documentation that board members or employees whose criminal history checks deemed them ineligible to serve were removed from service; **or** a signed statement attesting that within the last three (3) years there have been no instances of nepotism, conflicts of interest, or revelations in criminal history checks that deemed any board members or employee ineligible to serve. **(Attachment F: Compliance Information)**
- ❖ **Business Plan** — A business plan developed in accordance with the requirements outlined in 19 TAC §100.1033(b)(9)(A)(vii)(I-XI) and reviewed by the board shall be submitted within ten business days upon request by TEA.
- ❖ **By-laws and Articles of Incorporation** – Must be current and on file with the agency.



## Section IV - Expansion Amendment Request Checklist

Include for Expansion Amendment Requests:

- Attachment A: Board resolution** *(required for **all** requests)*
- Attachment B: Agenda and minutes** *(required for **all** requests)*
- Attachment C: Evidence of Impact Notification(s)** *(required for **campus** expansion requests only)*
- Attachment D: Scope and Sequence** *(required for **grade-level** expansion requests only)*
- Attachment E: Evidence of Notification to District(s)** *(required for **geographic boundary** expansion requests only)*
- Attachment F: Compliance Information** *(required for **all** requests)*



# Section V - Attestations

### Superintendent Attestation –

As the Superintendent of the charter school, I understand that an expansion amendment is not a right or entitlement and that in determining if a change in the contract for charter is appropriate, the commissioner of education will review and consider specific issues including, but not limited to: charter performance data (e.g., accountability ratings, FIRST ratings, accreditation statuses, and underlying data) and compliance information. I also understand that prior to approving an expansion amendment request, staff in the following divisions and program areas will be consulted to determine if any potential problems or concerns exist with the charter holder or charter school: Performance Reporting, Charter School Administration, Child Nutrition, Financial Audits, Grants Administration, Legal Services, PEIMS Data Reporting, School Improvement, Federal Programs, Student Assessment, Governance, General Inquiries, and Complaints. I further understand that incomplete submissions may cause a delay in processing until all required documentation has been received by the Division of Charter School Administration and that the amendment request is not considered complete until such time.

Printed Name of Superintendent  Phone Number

Signature of Superintendent  Email Address

Phone Number



### Board President Attestation –

As the President of the governing body of the charter holder, I understand that an expansion amendment is not a right or entitlement and that in determining if a change in the contract for charter is appropriate, the commissioner of education will review and consider specific issues including, but not limited to: charter performance data (e.g., accountability ratings, FIRST ratings, accreditation statuses, and underlying data) and compliance information. I also understand that prior to approving an expansion amendment request, staff in the following divisions and program areas will be consulted to determine if any potential problems or concerns exist with the charter holder or charter school: Performance Reporting, Charter School Administration, Child Nutrition, Financial Audits, Grants Administration, Legal Services, PEIMS Data Reporting, School Improvement, Federal Programs, Student Assessment, Governance, General Inquiries, and Complaints. I further understand that incomplete submissions may cause a delay in processing until all required documentation has been received by the Division of Charter School Administration and that the amendment request is not considered complete until such time.

Printed Name of Board President  Phone Number

Signature of Board President  Email Address

Phone Number

# Expansion Amendment Request Documents Submittal



All submissions are electronic

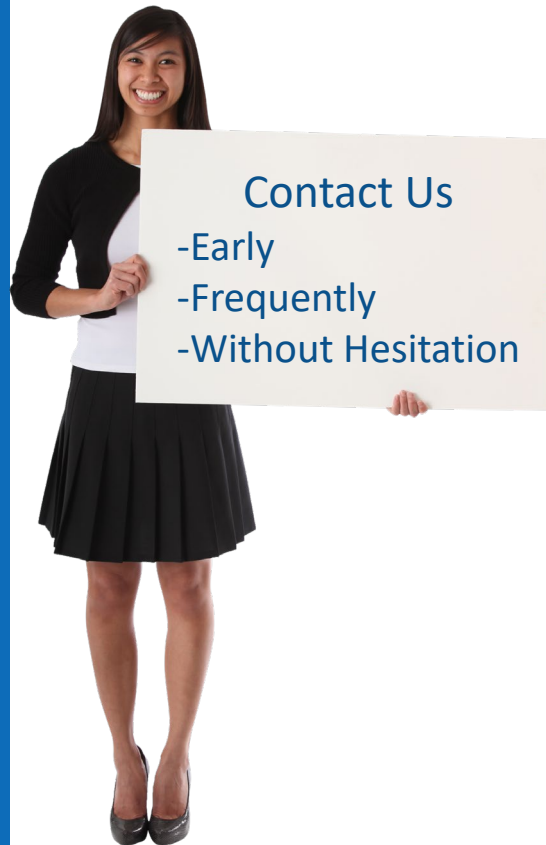


Remember to include all signed documents



[charteramendments@tea.texas.gov](mailto:charteramendments@tea.texas.gov)

# Expansion Amendment Staff Contacts



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(Charter Operators **A – L**)  
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- Laurie McIntyre, Portfolio Coordinator  
(Charters Operators **M – Z**)  
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