

School Location Amendment Request

Purpose

The *School Location Amendment Request* is used if the charter holder needs to change a charter school's physical address currently on file with the Board and provides the charter holder the opportunity to request an increase in the enrollment cap (if needed) in one submission.

A request including an increase in enrollment cap must be submitted timely so that it may be processed within the timeframe provided in Rule and implemented according to the ADE School Finance Policy SF-0001 — Charter Enrollment Cap Amendments. An enrollment cap is not effective until approved by the Board.

It is not necessary to file this request to change the school's mailing address or phone/fax numbers on file with the Board. The authorized charter representative should log in to the ASBCS online system, choose the appropriate school, and click the "edit address" or "edit phone and fax number" link. Please note this change will still require the charter representative to upload board minutes indicating the change has been approved.

*Before submitting this request, **ensure the charter holder is in compliance per the Board's policy**. If a charter holder is not in compliance, the request may be deemed incomplete and the non-compliance may be recorded on the charter holder's operational dashboard.*

Determining Eligibility

Any charter holder is eligible to submit a *School Location Amendment Request*.

To determine whether your charter is eligible to increase the enrollment cap, a charter holder, its Associated Schools and Associated Charters (as applicable) must meet eligibility criteria based on its performance on the academic, financial, and operational dashboards. An eligible charter holder may submit a request to increase the enrollment cap for up to three fiscal years of projected student enrollment. The criteria is found in the "Eligibility Criteria" in [The Guide](#).

Board Consideration

A substantively complete amendment request to **only** change the school's location may be considered for approval by the Executive Director or may be placed on the agenda of a regular Board meeting.

A substantively complete amendment request that **includes** an increase in enrollment cap that meets the eligibility criteria shall be placed on the agenda of a regular Board meeting. The Board will take action to approve or deny both requests simultaneously. If you prefer each request to be considered separately, submit the enrollment cap request as a separate form.

If a charter holder is eligible to submit a request to increase the enrollment cap, it must maintain eligibility prior to Board consideration. For information on maintaining eligibility review the section on "Eligibility Criteria" in [The Guide](#).

A finding that the charter holder is not in compliance in one or more operational areas may result in a delay in consideration of the request.

If the Board approves a request to increase enrollment cap of a charter contract and the *Occupancy Compliance Assurance and Understanding form* is submitted, the request to increase enrollment cap is approved with the condition that the charter holder agrees to provide a Certificate of Occupancy and Fire Marshal's reports approved for educational use, for the additional increase of students within the fiscal year

requested. If the charter holder does not fulfill those requirements, the charter holder will have to resubmit an enrollment cap request to the Board for its approval.

Staff Recommendation for an Enrollment Cap Increase

A *School Location Amendment Request* that includes an increase in the enrollment cap will receive a staff recommendation for the expansion if the charter holder’s current data and performance demonstrates all of the following criteria:

Charter holder has been in operation for three years;
Rating of “Meets Operational Standard” in the most recent Fiscal Year;
Rating of “Meets Financial Performance Standard” in the most recent Fiscal Year;
Past enrollment trends indicate need for increase within three years;
ADM is within 85% of current enrollment cap; and
Each school operated by the charter holder performs at or above the average performance of a majority of schools within a five-mile radius of the school’s location; OR School(s) offers a unique program of instruction within a five-mile radius of the school’s location.

Instructions for the Request

Work through the form in ASBCS Online, filling in all required fields and uploads (denoted by "*"). Follow the instructions for each upload field. Be sure to save your work, even if you aren't prepared to submit your form, so that you do not lose your data.

Form Fields

Field	Instructions
Select School*	Choose the button for the school that the Charter Holder is requesting to move to a new location.
Current Address, Phone Number, and Fax Number	This information will prepopulate based on the school that is chosen in the previous step.
New Address, Phone Number, and Fax Number*	Check all boxes that apply to this request.
Effective Date of Change*	Identify the date on which the change is intended to be implemented.
New Physical Address	Identify the new address at which the school will be operating, including the street address, city, state, zip, phone, and fax number.

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New Mailing Address If this information is the same as the physical address, check the “Same as new physical address” box. If not, identify the new address at which the school will be receiving mail, including the street address, city, state, zip, phone, and fax number.

Is an Enrollment Cap Increase being added to this request? Select a button.
 No Yes, an Enrollment Cap Increase is being requested.

From: Confirm that the *From* field accurately identifies the Enrollment Cap approved for the charter contract. If not, contact Board staff.

To: Enter the Enrollment Cap being requested, ensuring it is supported by the documented capacity of the facility/facilities identified.

Attachments

For further information regarding specific documentation requirements, see [The Guide \(Attachment Guidelines\)](#) and the administrative and substantive completeness requirements following this section.

Board Minutes or Board Resolutions*

Board minutes or board resolutions approving or addressing the change to the physical address currently on file with the Board for a charter school and increase in enrollment cap (if applicable).

Occupancy Documentation

For the proposed facility, clearly label and provide the following documents in the upload area:

- A Certificate of Occupancy, approved for educational use, **and**
- A current Fire Marshal’s Inspection Report, approved for educational use.
- If the Certificate of Occupancy and/or Fire Marshal’s Inspection Report do not list the capacity load of the facility, provide additional documentation (e.g. floor plans with classroom square footage, architectural drawings clearly indicating internal building dimensions) to document capacity. Hand-drawn images will not be accepted.
- If a Certificate of Occupancy and/or Fire Marshal’s Report are not available at the time of submission, an *Occupancy Compliance Assurance and Understanding* form, signed by a Charter Representative, may be submitted in its place.
- **Lease Agreement, Proof of Purchase, or Builder Contract**
For the proposed facility, upload a scanned copy of the appropriate documentation.
- **Copy of Current Liability Insurance Coverage**
Upload the appropriate documentation, which must identify the charter holder requesting expansion.
- **Agricultural Land Regulation Assurance**
Upload a completed *Agricultural Land Regulation Assurance and Understanding* form signed by a charter representative.

Occupancy Documentation (Increase Enrollment Cap)

For the existing facility(ies), clearly label and provide the following documents in the upload area:

- A Certificate of Occupancy, approved for educational use, **and**
- A current Fire Marshal’s Inspection Report.
- If the Certificate of Occupancy or Fire Marshal’s Inspection Report do not list the capacity load of the facility, provide additional documentation (e.g. floor plans with classroom square footage, architectural drawings clearly indicating internal building dimensions) to document capacity. Hand-drawn images will not be accepted.

Narrative

Upload a narrative that responds to the following prompts:

- Provide the rationale for this request.
- Provide a justification for the enrollment targets identified in each Enrollment Matrix submitted. Include:
 - A description of the market analysis that supports the successful enrollment of the projected student count that addresses:
 - Other educational options available to students in the target area;
 - An explanation of need for the school; and
 - Factual data to support the need.
 - The timeline for enrollment at the proposed school, and explain the process for communicating to the public.
- (If the school is moving **more than 5 miles** from its current location)*
 - Discuss the percentage of students from the previous location that have committed to/are projected to remain enrolled at the new location. Include the following:
 - The percent of students that the charter holder projects will remain enrolled at the school after relocation;
 - The factual data that supports this projection; and
 - The plan for ensuring the transition of these students to the new location.
 - Identify the target population the school will serve at the proposed location. Demonstrate a clear understanding of the following:
 - The students the school intends to serve;
 - How the population is similar to, or different from, the population currently served by the school(s) operating under the charter;
 - Whether the students will be primarily neighborhood or commuter;
 - A demographic profile of the population; and
 - Current levels of academic performance.

Narrative (Increase Enrollment Cap)

- Provide a detailed staffing plan consistent with each Staffing Chart submitted with this request. Describe how the (administrative, instructional, and non-instructional) staffing, enrollment, and target population needs will be addressed by the following processes:
 - Recruitment;
 - Hiring; and
 - Training.
- If changes to staffing are not needed, provide an explanation.
- Provide a justification for the enrollment targets identified in each Enrollment Matrix submitted. Include:
 - A plan for meeting each year’s enrollment targets;
 - Necessary advertising and/or promotion (if applicable)
 - Number of returning students; and
 - Anticipated new student enrollment.

Identify the concrete resources, if any, needed for implementation. Consider the changes needed to curriculum, assessment, and instruction to implement this request. Provide the rationale for your response. If the response indicates that resources are not needed to implement the request, explain why.

Additional Information

- Enrollment Matrix
 - Complete for **each school** operated by the charter, detailing the current and targeted number of students served per grade for the subsequent three Fiscal Years. Additionally, complete the matrix for the **proposed school** facility for its first three years.

Additional Information (Increase Enrollment Cap)

- Staffing Chart
 - Complete for **each school** operated by the charter, identifying the current and anticipated staffing information for the subsequent three Fiscal Years.
 - Financial Documentation (Only for charter holders that **do not meet** the Board’s financial performance expectations)—as described in Appendix B of the [Financial Performance Framework Guidance](#) (FPFG):
 - Upload the financial performance response as described in Appendix C of the FPFG.

Administrative Completeness Review

An administratively complete request includes the following (as applicable):

- Board Minutes
 - Approval to change the physical address currently on file with the Board for a charter school and increase in enrollment cap (if applicable), by the charter holder (approving board);
 - Approving board aligns with what is currently on file with ASBCS; and
 - Board minutes comply with Open Meeting Law (if applicable); or
 - Board resolution is signed by all current board members if the approving board is not subject to Open Meeting Law.
- Occupancy Documentation for the proposed school facility:
 - Certificate of Occupancy and current Fire Marshal’s report, both approved for educational use; OR
 - Completed *Occupancy Compliance and Understanding* form that is signed and dated by the Charter Representative.
- Occupancy Documentation for the existing facility(ies) if increasing the enrollment cap:
 - Certificate of Occupancy approved for educational use; **and**
 - Current Fire Marshal’s report, approved for educational use.
- Lease agreement, proof of purchase, or builder contract for proposed school facility.
- Copy of liability insurance coverage.
- Agricultural Land Regulation Assurance* form for new construction, signed and dated by the charter representative.
- Narrative, addressing all prompts.
- Completed Enrollment Matrix for each school operated by the charter holder.
- Completed Staffing Chart for each school operated by the charter holder.
- Financial Performance Response.
- All required forms are submitted on the approved ASBCS template.

Substantive Completeness Review

The following checklist will be used to determine substantive completeness for this request. Each criterion (if applicable) will either be deemed acceptable or not acceptable.

Review	Criteria
Board Minutes	<input type="checkbox"/> Board minutes indicate that the request has been approved and is consistent with the submitted form.
Occupancy Documentation (for proposed facility)	<input type="checkbox"/> Certificate of Occupancy; and Fire Marshal’s Inspection Report are current for Existing school facilities New construction (if applicable). <input type="checkbox"/> If the Certificate of Occupancy or Fire Marshal’s Inspection Report are not available at the time of submission, an Occupancy Compliance Assurance and Understanding Form is submitted and signed by the charter representative. <input type="checkbox"/> If neither displays occupancy, additional documentation demonstrates capacity that is in alignment with the charter holder’s current enrollment cap. <input type="checkbox"/> Additional documentation shows how the space is sufficient for the number of students requested.
Occupancy Documentation (Increase enrollment cap)	<input type="checkbox"/> Most recent Certificate of Occupancy; and Fire Marshal’s Inspection Report for existing facilities. <input type="checkbox"/> If neither displays occupancy, additional documentation demonstrates capacity that is in alignment with the charter holder’s current and proposed enrollment cap. Description includes how the space is sufficient for the number of students requested. Hand-drawn images will not be accepted. <input type="checkbox"/> Additional documentation shows how the space is sufficient for the number of students requested.
Lease Agreement, Proof of Purchase, or Builder Contract	<input type="checkbox"/> Documentation demonstrates an agreement for the proposed facility.
Liability Insurance Coverage	<input type="checkbox"/> Copy of current insurance policy includes the charter holder’s name as policyholder/insured.
Agricultural Land Regulation Assurance	<input type="checkbox"/> The form is submitted and signed by the charter representative.
Rationale (Narrative)	Description includes the following: <input type="checkbox"/> Rationale for relocating the school; <input type="checkbox"/> Rationale for increasing the enrollment cap; and <input type="checkbox"/> Rationale is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
Enrollment Matrix	<input type="checkbox"/> A completed Enrollment Matrix for the current and subsequent three Fiscal Years for each school operated by the charter holder, including the proposed school facility. <input type="checkbox"/> Each Enrollment Matrix is consistent with information contained in all applicable narrative prompts and accompanying attachments.
Enrollment Targets (Narrative)	<input type="checkbox"/> Description of enrollment is consistent with the targets identified in each Enrollment Matrix submitted.

	<ul style="list-style-type: none"> <input type="checkbox"/> Description of the market analysis includes: <ul style="list-style-type: none"> <input type="checkbox"/> Other educational options available to students in the target area; <input type="checkbox"/> An explanation of need for the school; and <input type="checkbox"/> Factual data to support the need. <input type="checkbox"/> Timeline for enrollment at the school is included and explains how it will be communicated to the public.
<p>Reenrollment Percentage (Narrative — More than 5 miles only)</p>	<p>Response includes:</p> <ul style="list-style-type: none"> <input type="checkbox"/> The percent of students that the charter holder projects will remain enrolled at the school after relocation; <input type="checkbox"/> The factual data that supports this projection; and <input type="checkbox"/> The plan for ensuring the transition of these students to the new location.
<p>Target Population (Narrative — More than 5 miles only)</p>	<p>Response includes:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identification of the target population; <input type="checkbox"/> How the target population is similar to, or different from, the current population served by the charter; and <input type="checkbox"/> Whether the population will be primarily neighborhood or commuter students. <p>Response provides the target population’s:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Demographic profile; and <input type="checkbox"/> Current levels of academic performance (e.g. AzMERIT data and letter grades). <ul style="list-style-type: none"> <input type="checkbox"/> Target population information is consistent with information contained in all other applicable narrative prompts and accompanying attachments.
<p>Staffing Chart (Increase enrollment cap)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Staffing Chart(s) identify the current and anticipated staffing information for the subsequent three Fiscal years. <input type="checkbox"/> Staffing Chart(s) include a leadership section for the school(s) operated by the charter holder. <input type="checkbox"/> Staffing Chart(s) is consistent with information contained in all applicable narrative prompt responses and accompanying attachments.
<p>Staffing Plan (Narrative – Increase enrollment cap)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Plan describes the charter’s staffing, enrollment and target population needs. <input type="checkbox"/> Plan addresses the processes for the needs identified in: <ul style="list-style-type: none"> <input type="checkbox"/> Recruitment; <input type="checkbox"/> Hiring; and <input type="checkbox"/> Training. <input type="checkbox"/> If no changes to staffing, the plan describes why there are no changes needed. <input type="checkbox"/> Staffing Plan is consistent with the information contained in all applicable narrative prompt responses and accompanying attachments.
<p>Enrollment Justification (Narrative – Increase enrollment cap)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Description includes: <ul style="list-style-type: none"> <input type="checkbox"/> A plan for meeting each year’s enrollment targets; and <input type="checkbox"/> Necessary advertising and/or promotion to meet the targets. <input type="checkbox"/> Number of returning students <input type="checkbox"/> Anticipated new student enrollment <input type="checkbox"/> Enrollment Justification is consistent with the information contained in all applicable narrative prompts and accompanying attachments.

Resources (Narrative – Increase enrollment cap)

Concrete resources are identified for the following areas:

- Curriculum; and/or
- Assessment; and/or
- Instruction

Rationale includes why these resources are needed, or why additional resources are not needed to implement the request.

Identified resources are consistent with information contained in all applicable narrative prompts and accompanying attachments.

Financial Documentation (Increase in enrollment cap)

Financial Performance Response that addresses each measure for the most recent audited fiscal year presented in the dashboard where the charter holder received a “Does Not Meet Standard”.