



Amendment Check List

Please review carefully and ensure that all items have been completed before submitting documentation to Epicenter. If you have questions, please reach out to Ashley Baquero at Ashley.baquero@dpi.nc.gov or 984.236.2708.

Please **DO NOT** submit this document with your amendment tasks in Epicenter. This is simply a tool to help you prepare documentation. Feel free to print out and make notes as you work through the amendment items.

Please check each item below:	Complete?	Notes
Does your cover letter have both the Board Chair and School Leader signatures? Electronic signatures are acceptable, but a typed signature is not. The only exception is for RTO schools that may not have a School Leader hired yet. In this case, a Board Chair signature will suffice.		
Did your cover letter include ALL of the following: <ul style="list-style-type: none">• An introductory paragraph that includes school name, LEA number (if assigned), county, years operating, grades served, etc. The point is to inform the CSAB/SBE of your school's basic information.• Clearly state the request and a reason for the request. More detail the better.• If your amendment will impact the budget, you need to explain how this has been accounted for (see item below). More positions added? More funding for instructional materials? School lunch or transportation needs? Etc.• If this is an enrollment/grade level request, the cover letter needs to include TWO enrollment charts – one titled “currently approved enrollment” and another titled “proposed enrollment.” Please include these charts in word format as they will be copied/pasted into SBE items to ensure accuracy.		
Have you submitted an updated budget and explained any budgetary changes in your cover		



Office of
CHARTER SCHOOLS
NC Department of Public Instruction

<p>letter? This is required for any amendment that impacts your school budget (e.g. any changes to enrollment, facility, vendor/EMO, staffing/curriculum, lunch program, etc.)</p> <p>It is usually much easier to simply submit an updated budget rather than to strike-through old budgets in the original charter application.</p>		
<p>If this is a weighted lottery request, please confirm you have included all necessary items in the cover letter (see weighted lottery guidance document) and the policy has been pre-approved by OCS staff.</p>		
<p>Do the board meeting minutes clearly demonstrate a vote and approval to request an amendment (for whatever you are seeking to change)? You may submit draft minutes. You do not need to submit the minutes showing approval of the minutes submitted – just the minutes showing approval of the amendment request.</p>		

OCS highly recommends keeping an internal history of your amendments. Each time an amendment is approved, the approved version becomes your current charter application. This is a great example of a charter school's record-keeping:

Version	Initiated by	Change Description	Board Approval
1.0	Original Board of Directors	Initial Creation of Charter	April 10, 2012
2.0	Board of Directors	Amended by-laws and governance items, including the registered agent, school address, aligned meeting notices with NC open meeting law	November 24, 2014
	Board of Directors	Amended Head of School and Assistant Head of School job responsibilities	January 28, 2015
	Administration	Amended graduation requirements	February 25, 2015
3.0	Board of Directors	A more concise mission statement, addition of a version history, removal of references to founding board members, modifications to the graduation requirements	February 24, 2020
4.0	Administration	Amended graduation requirements and formatting updated	May 24, 2021

16 NCAC 06G .0510 CHARTER AMENDMENTS FOR EXISTING PUBLIC CHARTER SCHOOLS - APPROVAL PROCESS

(a) The following constitute material charter amendments that require the State Board of Education's ("SBE") approval prior to implementation:

- (1) Grade expansion beyond increases contemplated in G.S. 115C-218.8(3);
- (2) Relocation outside a 5-mile radius or outside of the Local Education Agency (LEA) identified in the charter;
- (3) Transferring the charter to another non-profit entity;
- (4) Altering the mission or targeted student population;
- (5) Employing or terminating a management company;
- (6) Change to the charter application with respect to the National School Lunch program;
- (7) Enrollment growth, consistent with requirements in G.S. 115C-218.7.

(b) In determining whether to approve a material charter amendment, the SBE shall consider:

- (1) Demonstrated need for the amendment by the charter school;
- (2) Impact of the amendment on the student population, governing board of directors, and staff; and
- (3) Impact on the LEA.

(c) The following constitute charter amendments that require Department of Public Instruction staff approval prior to implementation, but do not require further approval from the SBE:

- (1) Bylaws;
- (2) The name of the charter school;
- (3) The Articles of Incorporation;
- (4) Relocation within a 5-mile radius or outside of the Local Education Agency (LEA) identified in the approved charter application;
- (5) Class sizes as stated in the approved charter application;
- (6) Length of school day;
- (7) Length of academic year;
- (8) Curriculum changes;
- (9) Change to the charter application with respect to student transportation;
- (10) Change to the charter application with respect to changing its food service plan;
- (11) Requests to delay the opening of the school by one year; and
- (12) Enrollment changes due to an approved one year delay.

(d) In determining whether to approve a material charter amendment, Office of Charter Schools staff shall consider:

- (1) Demonstrated need for the amendment by the charter school;
- (2) Impact of the amendment on the student population, governing board of directors, and staff; and
- (3) Impact on the LEA.

(e) Notwithstanding the foregoing, the Department of Public Instruction may submit any proposed amendment to the SBE for its review and approval or denial.

*History Note: Authority G.S. 115C-12; 115C-218.5; 115C-218.7; 115C-218.8;
Emergency Adoption Eff. August 20, 2019;
Eff. March 17, 2021.*

**16 NCAC 06G .0511 CHARTER AMENDMENTS FOR EXISTING PUBLIC CHARTER SCHOOLS –
REQUIRED DOCUMENTATION**

(a) A charter holder shall submit the following documentation to the State Board of Education when it seeks to amend its approved charter application:

- (1) Board meeting minutes reflecting the vote of the Board of Directors for the charter school;
- (2) A cover letter explaining the request signed by the nonprofit board chair and lead administrator of the charter school;
- (3) A version of the charter application showing proposed amendments as strikethroughs and underlines; and
- (4) The proposed amended text to the charter application without strikethroughs or underlines.

(b) If the charter holder does not provide the required documentation, its amendment proposal shall not be processed.

*History Note: Authority G.S. 115C-218.7; 115C-218.8;
Emergency Adoption Eff. August 20, 2019;
Eff. March 17, 2021.*