Charter School ADM Projection System – CSADM

Preliminary Phase II Review and Preparation Guidelines

The CSADM Phase II Final Verification-Initial ADM submissions are required of all:

- current charter schools with 2020-21 school attendance,
- new charter schools approved by the State Board of Education to open July 1, 2021, and
- The University of North Carolina (UNC) laboratory schools scheduled to open July 1, 2021.

CSADM Phase II Final Verification-Initial ADM requires all charter, UNC Laboratory and regional schools to identify with a scenario listed below, which will determine if the school shall be required to provide a breakdown of where their students are coming from.

Questions should be addressed angela.harrison@dpi.nc.gov.
Overview

The ADM entered in Phase II will determine if the charter school is required to submit a student breakdown before submission.

If a charter school, UNC laboratory or regional school identifies with one of the following scenarios: a student breakdown is required before submission.

- **Scenario 1**
  - Page 4
  - New Charter School - First Time Opening SY 2021-22

- **Scenario 2**
  - Page 5
  - State Board of Education approved charter to grow ADM greater than 20 % or 25%

- **Scenario 3**
  - Page 6
  - No planned growth in charter and the State Board of Education approved charter to grow ADM greater than 20 % or 25%

- **Scenario 4**
  - Page 7
  - Planned growth within charter is greater than the 20% or 25% ADM maximum growth

- **Scenario 5**
  - Page 8
  - Increase Phase I ADM Projection Initial Submission
If a charter, UNC lab or regional school identifies with one of the following scenarios: a student breakdown is **NOT** required before submission.

- **Scenario 6**
  - Page 9
  - Decrease Phase I ADM Projection Initial Submission

- **Scenario 7**
  - Page 10
  - Charter School does not identify with any of the previous scenarios 1 – 6
Preliminary Phase II Review and Preparation Guidelines

Scenario 1: New Charter School - First Time Opening SY 2021-22**

CSADM obtains the projected enrollment information from the charter school application (see example below)

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** the CSADM Phase 0 and Phase I tabs are not applicable for new charters and UNC Lab schools opening 1st time

Go To Section I. Prepare documents for student breakdown
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Scenario 2: The State Board of Education approved the charter to grow ADM greater Than 20% or 25%

Example - CSADM screen shot

Go To Section I. Prepare documents for student breakdown
Scenario 3: No planned growth in the charter and the State Board of Education approved charter to grow ADM greater Than 20% or 25%

Example - CSADM screen shot

<table>
<thead>
<tr>
<th>Phase II. Final Verification: Initial ADM for School Year 2017-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS#</td>
</tr>
<tr>
<td>Section 1: Average Daily Membership (ADM)</td>
</tr>
<tr>
<td>2017-2018 ADM per Charter Application:</td>
</tr>
<tr>
<td>2016-2017 1st Month ADM: 393</td>
</tr>
<tr>
<td>20% of the 1st Month ADM: 79</td>
</tr>
<tr>
<td>2017-2018 ADM Maximum Growth:</td>
</tr>
<tr>
<td>2017-2018 Phase I. ADM Projection Initial Submission:</td>
</tr>
<tr>
<td>State Board Approved ADM: 500 (3)</td>
</tr>
<tr>
<td>NCDPI Budgeted ADM: 472</td>
</tr>
<tr>
<td>2017-2018 Maximum Allowed for Initial ADM: 500</td>
</tr>
</tbody>
</table>

N/A denotes charter has no planned growth. These are usually charters in operating beyond 10+ years

Go To Section I. Prepare documents for student breakdown
Scenario 4: Planned growth within the charter(1) is greater than the 20% or 25% ADM maximum growth(2)

Example - CSADM screen shot

<table>
<thead>
<tr>
<th>Phase II. Final Verification: Initial ADM for School Year 2017-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS#</td>
</tr>
<tr>
<td>2017-2018 ADM per Charter Application: 736 (1)</td>
</tr>
<tr>
<td>2016-2017 1st Month ADM: 409</td>
</tr>
<tr>
<td>20% of the 1st Month ADM: 82</td>
</tr>
<tr>
<td>2017-2018 ADM Maximum Growth: 491 (2)</td>
</tr>
<tr>
<td>2017-2018 Phase I. ADM Projection Initial Submission: 560</td>
</tr>
<tr>
<td>NCDPI Budgeted ADM: 491</td>
</tr>
<tr>
<td>2017-2018 Maximum Allowed for Initial ADM: 736</td>
</tr>
</tbody>
</table>

<= This is the highest among (1) Charter Application, (2) Maximum Growth, or (3) State Board Approved ADM, if applicable.

Go To Section I. Prepare documents for student breakdown
Scenario 5: Increase Phase I ADM Projection Initial Submission

Example CSADM screen shot

Phase II. Final Verification: Initial ADM for School Year 2017-2018

<table>
<thead>
<tr>
<th>CS# :</th>
</tr>
</thead>
</table>

Section 1: Average Daily Membership (ADM)

- 2017-2018 ADM per Charter Application: 1,144 (1)
- 2016-2017 1st Month ADM: 812
- 20% of the 1st Month ADM: 162
- 2017-2018 ADM Maximum Growth: 924 (2)

2017-2018 Phase I. ADM Projection Initial Submission: 950

NCDPI Budgeted ADM: 884

2017-2018 Maximum Allowed for Initial ADM: 1,144

Increased Phase I ADM from 950 to 960 but cannot exceed ADM per charter application (1)

Section 2: The Initial ADM

The Initial ADM that the school provides below will be the ADM that is used for the first installment of the annual allotment. The funded ADM may be lower based on the actual 1st month ADM in school year 2017-2018. However, the funded ADM shall not be higher than the Initial ADM, even if the 2017-2018 Maximum Allowed for Initial ADM is higher. Therefore, the State will not provide funds for ADM greater than what you enter for the Initial ADM.

Enter the Initial ADM: 960
Save the Initial ADM

In the box below, provide explanation to have 960 Initial ADM which is more than the Projected ADM 950 confirmed on May.

Siblings increase
Save Explanation

Please click 'Confirm' button that the Initial ADM entered above will be the maximum funded ADM for School Year 2017-2018.

Go To Section I. Prepare documents for student breakdown
Scenario 6: Decrease Phase I ADM Projection Initial Submission

Example - CSADM screen shot

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**Phase II. Final Verification: Initial ADM for School Year 2017-2018**

<table>
<thead>
<tr>
<th>Section 1: Average Daily Membership (ADM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-2018 ADM per Charter Application: 1,140 (1)</td>
</tr>
<tr>
<td>2016-2017 1st Month ADM: 463</td>
</tr>
<tr>
<td>20% of the 1st Month ADM: 93</td>
</tr>
<tr>
<td>2017-2018 ADM Maximum Growth: 556 (2)</td>
</tr>
<tr>
<td>2017-2018 Phase I, ADM Projection Initial Submission: 556</td>
</tr>
<tr>
<td>NCDPI Budgeted ADM: 925</td>
</tr>
<tr>
<td>2017-2018 Maximum Allowed for Initial ADM: 1,140</td>
</tr>
</tbody>
</table>

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The Initial ADM that the school provides below will be the ADM that is used for the first installment of the annual allotment. The funded ADM may be lower based on the actual 1st month ADM in school year 2017-2018. However, the funded ADM shall not be higher than this Initial ADM, even if the 2017-2018 Maximum Allowed for Initial ADM is higher. Therefore, the State will not provide funds for ADM greater than what you enter for the Initial ADM.

**The Initial ADM:** 400

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CSADM will not require a student breakdown – just submit – you have successfully completed Phase II.
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 Scenario 7: Charter School does not identify with any of the previous scenarios 1 – 6.

CSADM will not require a student breakdown – just submit – you have successfully completed Phase II.
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**Section I. Prepare documents for student breakdown**

Breakdown student counts as follows:

A. Returning students - the total number of students who were enrolled in the charter school for the current school year and will return to the charter school for the next school year

B. Future students – the total number of students not included as returning students (#1 above) but are anticipated to enroll for the upcoming school year. Categorize these students as follows:
   a. Other, out of state school (if applicable) – total number of future students coming from another state
   b. Other, private school - in state (if applicable) – total number of students from a private schools in state
   c. Other, home schools - in state (if applicable) – total number of students from an instate home school
   d. New students - total number of students not included above. Include Kindergarten students, if applicable, in the count of the LEA in which the student resides.
Section I. Prepare documents for student breakdown - continued

Using The Initial ADM entered in Section 2, prepare the student breakdown (see examples below)

Phase II. Final Verification: Initial ADM for School Year 2016-2017

Section 1: Average Daily Membership (ADM)

- 2016-2017 ADM per Charter Application: 878 (1)
- 2015-2016 1st Month ADM: 682
- 20% of the 1st Month ADM: 136
- 2016-2017 ADM Maximum Growth: 818 (2)
- 2016-2017 Phase I. ADM Projection Initial Submission: 825
- NCDPI Budgeted ADM: 784

<= This is the highest among (1) Charter Application, (2) Maximum Growth, or (3) State Board Approved ADM, if applicable.

Section 2: The Initial ADM

This section displays beginning June 1

The Initial ADM that the school provides below will be the ADM that is used for the first installment of the annual allotment. The funded ADM may be lower based on the actual 1st month ADM in school year. However, the funded ADM shall not be higher than this Initial ADM, even if the Maximum Allowed for Initial ADM is higher. Therefore, the State will not provide funds for ADM greater than what you enter for the Initial ADM.

The Initial ADM: 838

Represents the number of students anticipated to enroll. Identify the LEA or charter schools, etc. from which students will come from. See breakdown categories below.
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Section I. Prepare documents for student breakdown - continued

Continue to follow the instructions displayed on the screen.

Once completed, your screen should look similar to the one below - displaying the LEAs your students are coming from.

** An error message will display if Section 3 and Section 2: Initial ADM do not match. Please follow instructions to correct the Initial ADM to match. **

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Your CS#</th>
<th>Name of Previously Attended LEA/CS</th>
<th>Initial ADM Detail</th>
<th>Update Person</th>
<th>Update Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-2017</td>
<td>XXX</td>
<td>LEA#010 Alamance-Burlington</td>
<td>125</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016-2017</td>
<td>XXX</td>
<td>CS #01B River Mill Academy</td>
<td>691</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016-2017</td>
<td>XXX</td>
<td>LEA#320 Durham Public</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016-2017</td>
<td>XXX</td>
<td>LEA#410 Guilford County</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016-2017</td>
<td>XXX</td>
<td>LEA#680 Orange County</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016-2017</td>
<td>XXX</td>
<td>LEA#730 Person County</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The total number in the Section 3: Initial ADM Detail must equal the number entered in Section 2: The Initial ADM

** An error message will display if Section 3 and Section 2: Initial ADM do not match. Please follow instructions to correct the Initial ADM to match. **
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References:

1. **Average Daily Membership (ADM) for State Estimated (Planning) Allotment** *(NCDPI Budgeted ADM)*
   
   FBS > Allotments > Public Site for Allotment Data [http://apps.schools.nc.gov/publicschoolsallotmentdata](http://apps.schools.nc.gov/publicschoolsallotmentdata)

   Select “Support Documentation” tab

   **Example - screen shot**
References – *continued*

2. Financial and Business Services, Independent Public Schools Operations