



# **Charter School Amendment Petition Scoring Rubric**



# Guidance for Reviewing Amendment Petitions

## Overview

Pursuant to Tennessee Code Annotated (T.C.A.) § 49-13-110(d), the governing body of a charter school may petition its authorizer to amend its charter agreement.

A petition to amend a charter school agreement is an iterative and collaborative process between the charter school's governing body and the authorizer. The authorizer's primary role is to perform comprehensive due diligence and collect sufficient information to determine if the amendment requested is aligned with Tennessee laws and regulations and whether it supports the school's goals and student academic outcomes.

For a complete overview of the amendment petition process, please review the [Amendment Petition Application](#).

## Types of Amendment Requests

The types of amendments to the charter agreement that can be requested are provided below. Petitioners may request to amend any of the following:

- A. Change in governance structure (including, but not limited to, a change in the nonprofit entity governing the school), or addition of or changes to a charter management organization or assignment of a charter management agreement<sup>1</sup>;
- B. The addition or removal of a grade level or levels;
- C. Changes in student enrollment which fall outside of the minimum or maximum enrollment thresholds set forth in the charter school's charter agreement;
- D. The addition or removal of a plan to provide transportation to students attending the charter school;
- E. Changes to the charter school's location, if outside the geographic area set forth in the charter agreement;
- F. Changes to the charter school's academic focus or goals set forth in the charter agreement; or
- G. Other material changes.

## Using this Document

In accordance with State Board Rule, all petitions must be evaluated using this scoring rubric. The scoring rubric is organized in alignment with the components of the amendment petition and includes general criteria for each item being evaluated. Reviewers should complete the following:

1. Review and evaluate all applicable parts of the amendment petition, including required attachments, noting key strengths and concerns accordingly.

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<sup>1</sup> This amendment request applies to CMOs and education service providers (ESPs) that are responsible for the management/operation of the school but does not apply to ESPs that provide select services such as accounting or human resources (HR) support.

2. If due diligence occurred as part of the review (e.g., review of supplemental information, authorizer/operator meetings), record the relevant information in the space provided within the [Overall Summary and Recommendation](#) page.
3. Provide a comprehensive summary of the application's strengths and concerns combined with any additional information collected to determine the overall recommendation.

## **Recommendations and Decisions**

In accordance with the State Board's Quality Charter Authorizing Standards, a quality authorizer grants amendments only to schools with a petition that demonstrates alignment to the school's mission and goals and provides specific, evidence-based information that shows thorough preparation and viability of the plan to successfully implement the proposed change.

Following a complete review of the amendment petition application and any conducted due diligence, including requests for supplemental information and authorizer/operator meetings, reviewers should develop an overall summary of the key strengths and concerns, if any, regarding the amendment request. Authorizing recommendations and decisions should not be based on box checking, community pressure, or personal beliefs, but rather a holistic review of the totality of evidence and professional judgement regarding the school's amendment request.

Amendment petitions are approved or denied based on the merit of the petition and any conducted due diligence. While the emergency status of a petition may be considered, it is recommended that authorizers also evaluate the substance of the request when determining whether to approve or deny an amendment petition. Authorizers must rule to approve or deny an emergency amendment petition within sixty (60) calendar days of receipt.

Partial approvals are not allowed; therefore, any amendment requests included in a singular petition application must be considered together. If a governing body is requesting multiple amendments that do not rely on the approval of another, each separate request must be submitted on its own petition application form and evaluated separately.

For any amendment requests that are denied, the governing body may choose to appeal the decision to the Charter Commission and/or restart the process by submitting a letter of intent at the next deadline.

# Amendment Petition Scoring Rubric

| Part I: General Information |                           |                                                                                                                                                                                                                                                                                                             |
|-----------------------------|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1                           | Rationale                 | The response includes a clear description of the proposed charter amendment and a logical, data-supported rationale explaining why the school is requesting this change and thoroughly addressing the community need that supports the proposed amendment.                                                  |
| 2                           | Strategic Plan/ Mission   | The response includes an explanation of how the amendment aligns with the school's mission, vision, and strategic goals, along with specific, measurable indicators used to track success of the proposed change.                                                                                           |
| 3                           | Student Impact            | The response includes a detailed analysis of the amendment's specific academic and non-academic impacts on students, such as the anticipated impact to academic achievement and growth as well as student well-being, behavioral health, or access to school services.                                      |
| 4                           | Financial Impact          | The response includes a comprehensive financial breakdown detailing projected revenues and expenses, coupled with a clear strategy for maintaining long-term financial health during and after implementation.                                                                                              |
| 5                           | Operational Impact        | The response includes an explicit description of how the amendment alters daily school operations, specific educational programs, and current or future staffing structures and includes a reasonable response to the alterations.                                                                          |
| 6                           | Stakeholder Engagement    | The response includes a summary of the deliberate methods used to gather comprehensive feedback from relevant internal groups like staff, board members, and/or families, as well as external groups that are part of the school community, such as neighbors, elected officials and/or community partners. |
| 7                           | Consideration of Feedback | The response includes a detailed description of the stakeholder support or opposition received as a result of the stakeholder engagement, paired with actionable mitigation plans to resolve any identified community concerns.                                                                             |
| 8                           | Contingency Plan          | The response includes a viable, operational backup plan that details exactly how the school will proceed if the amendment request is denied.                                                                                                                                                                |
| 9                           | Board Approval            | Attachments include official, signed board meeting minutes or an approved board resolution documenting the formal governing board vote to submit the amendment petition.                                                                                                                                    |
| 10                          | Community Need            | Attachments include relevant and timely stakeholder evidence that supports the school's need for the proposed amendment in the community. Types of evidence will vary based on the amendment requested.                                                                                                     |
| 11                          | Stakeholder Engagement    | Attachments include verifiable artifacts of community outreach, such as copies of sent notification emails, public hearing attendance logs, or compiled survey data results.                                                                                                                                |

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| 12                                                | Financial Documentation      | Attachments demonstrate that the school meets its obligations, can sustain operations, and remain viable in the medium term, especially under the proposed amendment scenario. <i>Note: Authorizer may also consider additional financial documentation already collected, such as audited financial statements or other formal financial data reports.</i> |
| <b>Strengths:</b>                                 |                              |                                                                                                                                                                                                                                                                                                                                                             |
| <b>Concerns:</b>                                  |                              |                                                                                                                                                                                                                                                                                                                                                             |
| <b>Subpart A - Change in Governance Structure</b> |                              |                                                                                                                                                                                                                                                                                                                                                             |
| 1                                                 | Structure and Implementation | The response includes a detailed breakdown of the proposed changes to the board's structure, a step-by-step implementation plan, and a realistic transition timeline.                                                                                                                                                                                       |
| 2                                                 | Oversight Impact             | The response includes a clear analysis explaining how the modified board structure will directly alter or improve the governance and accountability oversight of the school and a viable response to that impact.                                                                                                                                           |
| 3                                                 | Legal Transition Plan        | The response includes a thorough transition plan detailing any legal alterations to the charter holder's entity status, articles of incorporation, or charter transfer.                                                                                                                                                                                     |
| 4                                                 | Financial Transition Plan    | The response includes a legally sound transition plan that addresses any applicable asset transfers, dissolution processes, shifting public funds, facility lease assumptions, or the reassignment of outstanding debt.                                                                                                                                     |
| 5a                                                | Due Diligence                | The response includes a comprehensive overview of the board's vetting process for the selected Charter Management Organization (CMO), including specific selection criteria and evaluation methods.                                                                                                                                                         |
| 5b                                                | Conflict of Interest         | The response includes a transparent disclosure of any current or potential conflicts of interest between board members and the CMO, including all CMO affiliated third-party vendors.                                                                                                                                                                       |
| 5c                                                | Fee Structure                | The response includes a detailed description of the services to be purchased and corresponding costs, as well as a summary of the proposed modifications to education service provider contract(s), highlighting updated fee structures, newly packaged services, or consolidated agreements.                                                               |
| 6                                                 | Articles of Incorporation    | Attachments include Articles of Incorporation, featuring a clear redlined version highlighting text changes or complete documentation for a newly proposed charter entity.                                                                                                                                                                                  |
| 7                                                 | Board Bylaws                 | Attachments include updated Board Bylaws, featuring a clear redlined version highlighting governance changes or complete bylaws for a newly proposed charter entity.                                                                                                                                                                                        |
| 8                                                 | Financial Documentation      | Attachments include complete drafts or executed copies (as applicable) of relevant financial agreements, including memorandums of understanding, asset purchase contracts, or debt transfer notices.                                                                                                                                                        |

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| 9 | CMO Documentation | Attachments include new or proposed revisions to education service contracts that meet the requirements of the Quality Charter Authorizing Standards (3d). For contracts with a new organization, the attachments provide valid proof of the CMO's non-profit status and current state certification authorizing the organization to operate within Tennessee. |
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**Strengths:**

**Concerns:**

### Subpart B - Addition or Removal of Grade Levels

|   |                                     |                                                                                                                                                                                                                                                                               |
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| 1 | Rationale                           | The response includes a clear description of the requested grade-level adjustments and a relevant rationale, such as alignment with Local Education Agency (LEA) grade-band shifts or changing local conditions.                                                              |
| 2 | Community Need                      | The response includes a rationale with evidence such as a detailed market analysis or community needs assessment justifying the grade structure change. <i>Note: This question is N/A if the request stems from a corresponding change in the LEA's grade band structure.</i> |
| 3 | Operational and Programmatic Impact | The response includes a thorough explanation of how the addition or removal of grade levels will alter the school's existing academic programs, student schedules, and daily operations and includes a viable response to that impact.                                        |
| 4 | Physical Spaces                     | The response includes a concrete facility plan showing how the current building, classrooms, common areas, and/or specialized spaces will be adapted or reallocated to accommodate the proposed change.                                                                       |
| 5 | Staffing                            | The response includes an explicit staffing plan that supports the proposed change.                                                                                                                                                                                            |
| 6 | Record of Achievement               | The response includes a compelling historical analysis of student performance data that highlights state-level academic results and authorizer performance framework outcomes to support the proposed change.                                                                 |
| 7 | Other Factors                       | The response includes additional, verifiable supporting factors, such as low teacher turnover rates, targeted intervention metrics for specific subgroups, comprehensive professional development plans, or a documented strategy for closing achievement gaps.               |
| 8 | Enrollment Projections              | The response includes fully completed Enrollment Projection Summary and Anticipated Demographics charts covering each remaining fiscal year of the current charter agreement under the proposed model.                                                                        |

**Strengths:**

**Concerns:**

### Subpart C - Change in Student Enrollment

|                                                  |                                 |                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1                                                | Programmatic Impact             | The response includes a detailed analysis outlining how the change in student enrollment will modify the existing academic program and any adjustments needed in response.                                                                                                                                                                                                                                 |
| 2                                                | Community Need/Demand           | The response includes a clear explanation of the school's internal operational needs and documented external community demands support the proposed change.                                                                                                                                                                                                                                                |
| 3                                                | Enrollment Trends               | The response includes an accurate historical review of the school's student enrollment trends and verified waitlist data, if applicable, that supports the proposed change.                                                                                                                                                                                                                                |
| 4                                                | Physical Spaces                 | The response includes a realistic facility utilization plan detailing how physical building capacity, square footage, and/or specific classrooms will adapt to the proposed change.                                                                                                                                                                                                                        |
| 5                                                | Staffing                        | The response includes an explicit staffing plan that supports the proposed change.                                                                                                                                                                                                                                                                                                                         |
| 6                                                | Demographics                    | The response includes a logical description of how the proposed change will impact the school's demographics and a targeted demographic strategy detailing how the school will actively recruit and support students with disabilities, English language learners, and other subgroups to maintain alignment with the local school district or other targets identified in the school's charter agreement. |
| 7                                                | Record of Achievement           | The response includes a compelling historical analysis of student performance data that highlights state-level academic results and authorizer performance framework outcomes to support the proposed change.                                                                                                                                                                                              |
| 8                                                | Other Factors                   | The response includes additional, verifiable supporting factors, such as low teacher turnover rates, targeted intervention metrics for specific subgroups, comprehensive professional development plans, or a documented strategy for closing achievement gaps.                                                                                                                                            |
| 9                                                | Enrollment and Demographic Plan | The response includes fully completed Enrollment Projection Summary and Anticipated Demographics charts covering every remaining fiscal year of the current charter agreement under the proposed model.                                                                                                                                                                                                    |
| <b>Strengths:</b>                                |                                 |                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Concerns:</b>                                 |                                 |                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Subpart D - Change to Transportation Plan</b> |                                 |                                                                                                                                                                                                                                                                                                                                                                                                            |
| 1                                                | Transportation Plan             | The response includes a comprehensive overview of the school's active student transportation plan contrasted against a clear, detailed description of the newly proposed structural changes.                                                                                                                                                                                                               |
| 2                                                | Operational Impact              | The response includes a thorough analysis detailing how the modified transportation logistics will directly impact daily school operations, such as arrival and dismissal procedures, bell schedules, and administrative procedures, as well as how it will indirectly impact enrollment over time.                                                                                                        |

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| 3a                                           | Transportation Oversight     | The response includes a clear plan for oversight of transportation operations, including third-party vendor contracts or shared services as applicable, and provides a staffing plan that accounts for day-to-day program oversight, safety compliance, and reporting;<br><i>Note: This question will be N/A for a request to remove the transportation plan.</i> |
| 3b                                           | Transportation Oversight     | The response includes a legal compliance plan outlining exactly how the proposed transportation plan will adhere to all state vehicle safety rules and federal student transportation mandates and account for student well-being.<br><i>Note: This question will be N/A for a request to remove the transportation plan.</i>                                     |
| 4                                            | Special Transportation Needs | The response includes a concrete operational and financial strategy to accommodate students with specialized transportation accommodations.                                                                                                                                                                                                                       |
| 5                                            | Student Impact               | The response includes a detailed mitigation strategy for families who will lose transportation due to the proposed change. This plan should address the short-term impact of implementation and address communication with families.                                                                                                                              |
| 6                                            | Due Diligence                | Attachments include verifiable administrative evidence of thorough operational planning, such as official vendor service quotes, memorandums of understanding, shared services agreements, or maps and bus routes.                                                                                                                                                |
| <b>Strengths:</b>                            |                              |                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Concerns:</b>                             |                              |                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Subpart E - Change to School Location</b> |                              |                                                                                                                                                                                                                                                                                                                                                                   |
| 1                                            | Rationale                    | The response includes a detailed description of the newly targeted geographic location, the maximum building occupancy limits, and a logical, data-based rationale for the physical move.                                                                                                                                                                         |
| 2                                            | Community Need/Demand        | The response includes a clear explanation of internal capacity issues alongside documented community demand, specifically citing supporting evidence such as geographic accessibility, academic performance metrics, and/or facility quality limitations.                                                                                                         |
| 3                                            | Transition Plan              | The response includes a comprehensive plan that details any necessary facility buildout or remodel as well as an operational transition plan with relevant details such as timelines, milestones, and/or logistics for moving equipment, records, and programs into the new facility.                                                                             |
| 4                                            | Financial Impact             | The response includes a thorough analysis of the move's complete financial impact, detailing lease agreements, financing, buildout, equipment or other land or facility acquisition expenses.                                                                                                                                                                     |
| 5                                            | Due Diligence                | The response includes an explicit summary of the board's due diligence, including evidence of alternative site research, structural facility assessments, and long-term financial viability modeling.                                                                                                                                                             |

|                                                      |                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
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| 6                                                    | Student Impact          | The response includes a targeted demographic analysis explaining how the geographic shift will alter the current student body, paired with active strategies to support existing families, maintain target subgroups, and a plan to address the impact of the proposed change.                                                                                                                                                                     |
| 7                                                    | Contingency             | The response includes a viable financial contingency plan that explicitly outlines specific budget cuts, staffing freezes, and/or revenue alternatives if student enrollment drops below projections following the relocation.                                                                                                                                                                                                                     |
| 8                                                    | Financial Documentation | Attachments include additional documentation that supports the need and feasibility of the proposed change, such as official supporting real estate or architectural evidence (e.g., construction price quotes, facility floor plans, draft lease agreements, shared-space memorandums of understanding).                                                                                                                                          |
| <b>Strengths:</b>                                    |                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Concerns:</b>                                     |                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Subpart F - Change to Academic Focus or Goals</b> |                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 1                                                    | Academic Focus          | The response includes a comprehensive description contrasting the current academic focus or goals outlined in the charter agreement against the newly proposed academic focus or goals, detailing any structural shifts in design and how the proposed change supports the mission, student population, and anticipated outcomes.                                                                                                                  |
| 2                                                    | Student Impact          | The response includes a thorough student impact analysis outlining how the proposed change alters schedules, instructional groupings, and/or daily learning expectations.                                                                                                                                                                                                                                                                          |
| 3                                                    | Curriculum Selection    | The response includes a detailed curriculum overview across all core subject areas, explaining choices such as programs, materials, and pedagogical tools. If the proposed change results in new curriculum, the response also includes a detailed description of the intended curriculum mapping process to verify alignment between the new instructional strategies and curriculum selections and current Tennessee academic standards and law. |
| 4                                                    | Record of Achievement   | The response includes a data-backed academic record using state academic performance outcomes and formal authorizer performance framework metrics that support the proposed change.                                                                                                                                                                                                                                                                |
| <b>Strengths:</b>                                    |                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Concerns:</b>                                     |                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Subpart G – Other Material Change/Merger</b>      |                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

|                   |                                  |                                                                                                                                                                                                                                                               |
|-------------------|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1                 | Amendment Description and Impact | The response includes a clear description of the amendment request and a comprehensive analysis detailing how the proposed change will alter daily operational workflows, existing academic programming, or current budget line items.                        |
| 2                 | Student Impact                   | The response includes a thorough student impact assessment outlining any direct changes to the student learning environment, daily schedules, or supportive school services.                                                                                  |
| 3                 | Charter Agreement Redline        | The response includes a clear identification of the exact clause, page, and section within the active charter agreement impacted by the proposed amendment, accompanied by a complete redlined text attachment showing all proposed insertions and deletions. |
| 4                 | Documentation                    | Attachments include a collection of relevant documents that support the proposed change, such as historical academic metrics, a history of clean audits, and formal stakeholder feedback summaries that directly justify the contractual modification.        |
| <b>Strengths:</b> |                                  |                                                                                                                                                                                                                                                               |
| <b>Concerns:</b>  |                                  |                                                                                                                                                                                                                                                               |

# Overall Summary and Recommendation

Reviewers should refer to the [Recommendations and Decisions](#) section of the guidance above prior to completing the Overall Summary and Recommendation. A quality authorizer considers the totality of evidence presented and uses professional judgement to determine its recommendation and authorizing decision.

| Summary of Conducted Due Diligence<br>(i.e., supplemental information, authorizer/operator meetings) |                                                                              |
|------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
|                                                                                                      |                                                                              |
| Summary of Overall Key Strengths<br>(Application + Due Diligence)                                    |                                                                              |
|                                                                                                      |                                                                              |
| Summary of Overall Outstanding Concerns<br>(Application + Due Diligence)                             |                                                                              |
|                                                                                                      |                                                                              |
| Overall Recommendation                                                                               |                                                                              |
| <input type="checkbox"/> The petition <b>is recommended</b> for approval                             | <input type="checkbox"/> The petition <b>is not recommended</b> for approval |