



Riverside County Office of Education
CHARTER SCHOOL PETITION REVIEW RUBRIC (Initial)

| Petition Information | | Petition Information and Timelines | | |
|---|--|------------------------------------|--|--|
| Name of Proposed Charter School: | <i>Select petition type:</i> <input type="checkbox"/> On appeal <input type="checkbox"/> County <input type="checkbox"/> Countywide For initial petition on appeal: <i>The District that denied the petition:</i> | | | |
| Name of Lead Petitioner: | | | | |
| Position of Lead Petitioner: | <i>Check that both of the following have been completed at the time of submission to the Riverside County Office of Education:</i> <input type="checkbox"/> The submitted petition is unchanged from the original submitted to the district <input type="checkbox"/> In conjunction with this submission, the denying district has received a copy of this appeal petition | | | |
| Phone Number: | Petition Submitted | Public Hearing | Board Decision | |
| | Date: | Date Due: | (90 days from submission may be extended 30 days if mutually agreed) | |
| Email Address: | | | Date Due: | |
| Address: | Was an extension requested? | Date Held: | Date of Board Decision: | |
| | <input type="checkbox"/> YES <input type="checkbox"/> NO | | | |

| Educational Program | |
|-------------------------------|---|
| Grade Level(s): | |
| Program Type: | <input type="checkbox"/> Seat-based <input type="checkbox"/> Independent Study <input type="checkbox"/> Blended |
| Alternative Education: | <input type="checkbox"/> YES <input type="checkbox"/> NO |

| Community Interest in Proposed Charter School | |
|---|--|
| Signature Requirement Met: | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| Signatures provided by: | <input type="checkbox"/> Parents/ Legal Guardians <input type="checkbox"/> Meaningfully Interested Teachers |
| Verification of Signatures: <i>(All of the following will be verified during the petition review process)</i> | <input type="checkbox"/> Number of signatures meets the minimum requirement <input type="checkbox"/> Signatures provided represent meaningfully interested parties <input type="checkbox"/> Signatures represent appropriately qualified teachers or appropriately-aged students |

| Facility Information | |
|--------------------------------------|--|
| Facilities have been secured: | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| If YES, Proposed Facility Address: | <div style="display: flex; justify-content: space-between;"> Street City State Zip Code </div> |
| If NO, Facilities Being Considered: | <div style="display: flex; justify-content: space-between;"> Street City State Zip Code </div> |
| | <div style="display: flex; justify-content: space-between;"> Street City State Zip Code </div> |

| SELPA Information | |
|--|---|
| Has the Charter School applied for or been approved as a member of a SELPA? | <input type="checkbox"/> YES Name of SELPA: <input type="checkbox"/> NO (If NO, plan for SELPA membership must be included in petition.) |

| Affiliated Schools/Prior Charter School Experience | |
|---|--|
| Any past or current operational charter schools affiliated with proposed charter school or | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| Name of School: | |
| Mailing Address: | <div style="display: flex; justify-content: space-between;"> Street City State Zip Code </div> |
| Name of Authorizing Agency: | |
| Authorizer Contact Information: | <div style="display: flex; justify-content: space-between;"> Name Phone email </div> |

| Related Business Organizations and Other Corporate Affiliations | |
|---|---|
| List all corporations or business entities related to the corporation/proposed to operate the charter school and/or lead petitioner(s). Explain whether, and to what extent, those other entities will participate in operating the charter school. (Use additional pages as necessary) | |
| Related or Affiliated Entity/ Service Provided | Contact Information |
| | <div style="display: flex; justify-content: space-between;"> Name Phone email </div> |
| | <div style="display: flex; justify-content: space-between;"> Name Phone email </div> |

Petition Review Team

The following team members are responsible for reviewing each corresponding section of the charter school petition.

| Area of Review EC 47605 and 47605.5 (Countywide Petitions Only) | Unit/ Department | Name of Reviewer(s) |
|--|-----------------------------------|---|
| A. Educational Program | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| B. Measurable Pupil Outcomes | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| C. Student Progress Measurement (Metrics) | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| D. Governance Structure | Pupil and Administrative Services | Susan Levine |
| E. Employee Qualifications | Credentialing and Certification | Jenny Teresi |
| F. Health and Safety | Pupil and Administrative Services | Susan Levine |
| G. Racial & Ethnic Balance | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| H. Admissions Policies and Procedures | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| I. Annual Financial Audits | District Fiscal Services | Bethany Figueroa |
| J. Suspension and Expulsion | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| K. Staff Retirement System | Personnel Services | Heather Williams |
| L. Public School Attendance Alternatives | Pupil and Administrative Services | Susan Levine |
| M. Rights of District Employees | Pupil and Administrative Services | Susan Levine |
| N. Dispute Resolution Process | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| O. Closure | Charter Schools Unit | Corey Loomis, Susie Smith, Kelly Inouye |
| Supplemental Criteria | | |
| Area of Review EC Sections: 47605(c), 47605(e), 47605(h), 47605.5, 47641(a), 47646 | Unit/ Department | Name of Reviewer(s) |
| Financial/Administrative Plan | District Fiscal Services | Bethany Figueroa |
| Charter Management Organization | Charter Schools Unit | Corey Loomis, Susan Smith, Kelly Inouye |
| Facilities | Charter Schools Unit | Corey Loomis, Susan Smith, Kelly Inouye |
| Impact Statement | District Fiscal Services | Bethany Figueroa |
| Community Impact | Charter Schools Unit | Corey Loomis, Susan Smith, Kelly Inouye |
| Special Education/504 | Special Education | Sue Balt |
| Independent Study (If applicable) | Charter Schools Unit | Corey Loomis, Susan Smith, Kelly Inouye |
| Countywide Benefit Requirements (If applicable) | Charter Schools Unit | Corey Loomis, Susan Smith, Kelly Inouye |
| Alternative Educational Programs (If applicable) | Charter Schools Unit | Corey Loomis, Susan Smith, Kelly Inouye |

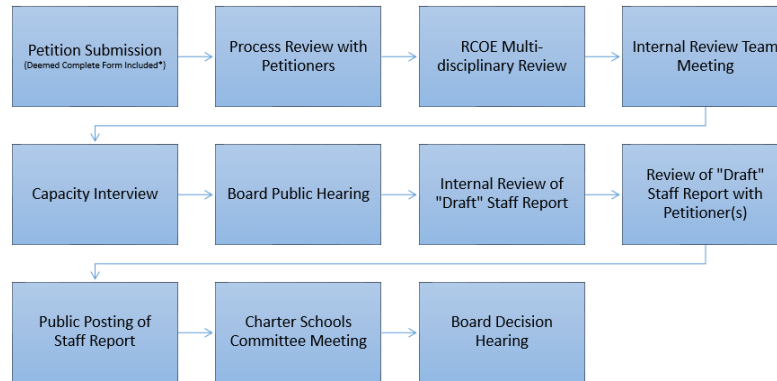


CHARTER SCHOOL PETITION SUBMISSION

Process Information and Instructions for Petitioner

Petition Review Process

The Riverside County Office of Education (RCOE) is responsible for processing petitions submitted to the Riverside County Board of Education (RCBE). The RCBE and the RCOE staff view the responsibility to provide a quality education to all of the children in Riverside County as a serious undertaking. The petition review process is designed to be transparent, engaging, professional and rigorous. The Charter Schools Unit (CSU) staff will help guide petitioners through the process and will be available to answer questions. At the end of the process, a public comprehensive Staff Report will be provided to the RCBE in order to help the board make the best possible decisions for the students in the county. Each petition submitted to the RCBE is reviewed according to the following process:



Step 1: Petition Submission

The process begins when a petitioner submits a complete and legally compliant petition AND signed "deemed complete certification" form to RCOE as required by EDC 47605(b).

Step 2: Review of Process

Upon submission of a petition, CSU staff will contact the petitioner to provide an overview of the petition review process, including timelines, to ensure the petitioner has a complete understanding of what to expect during each step of the review. The petitioner will have the opportunity to ask questions and receive clarification on the petition review process. Below is an example timeline that will be provided.

Step 3: RCOE Multi-Disciplinary Review

It is the responsibility of the RCBE to determine whether granting the charter is consistent with sound educational practice and with interests of the community in which the school is proposing to locate [EDC 47605(c)]. The RCOE has the responsibility to review the petition and make written factual findings, setting forth specific facts to support one or more legal findings for denial as outlined in Education Code 47605(c)(1)-(5)(A)-(O). During this stage of the process, a RCOE multi-disciplinary team of experts from various divisions and units review submitted petitions for content, program effectiveness, fiscal solvency, legal compliance and feasibility in accordance with legal statute.

Step 4: Internal Review Team Meeting

Upon thorough analysis of the petition, the RCOE multi-disciplinary team collaborates to assess potential findings and discuss any questions and, or concerns. This information is utilized to form questions for the petitioner to answer at the Capacity Interview. Findings may also be included within the "draft" staff report.

Step 5: Capacity Interview

In order to provide the petitioner with the opportunity to demonstrate the capacity to successfully implement the program set forth in the charter petition [EDC 47605(c)(2)], Charter Schools Unit staff, along with RCOE Review Team Members, will conduct a capacity interview with the petitioner. The petitioner is encouraged to include the following individuals participate in the meeting: Lead Petitioner, governing board member(s), school administrator(s) and school finance personnel. Capacity Interviews are conducted in a positive and professional manner. Questions will originate from the RCOE Review Team's analysis of the petition. The Capacity Interview is a collaborative opportunity for RCOE staff and petitioners to ask and answer clarifying questions regarding the petition.

Step : 6 Board Public Hearing

The RCBE will hold a public hearing within 60 days of the petition submission. The purpose of the hearing is to provide the petitioner the opportunity to provide the RCBE an overview with key highlights of the petition and demonstrate the level of support for the petition by the prospective school community. If applicable, school district representatives are provided an equal opportunity of time to make comments regarding the petition. Members of the public will have the opportunity to make comments during the public hearing for the petition.

Step 7: Internal Review of "Draft" Staff Report

The CSU staff develops a draft staff report outlining the legal rationale for petition reviews and legal findings of the review based on the following: A RCOE multi-disciplinary team review and analysis, petitioner's Capacity Interview, Public Hearing and legal counsel review. The draft staff report is reviewed and discussed by the RCOE Administrative staff.

Step 8: Review of "Draft" Staff Report (with Petitioner)

Prior to finalizing the staff report, the Director of the Charter Schools Unit and RCOE Administrative staff will hold a meeting with the petitioner to review the draft Staff Report. The purpose of this meeting is to ensure that the report is factually accurate and to address any questions posed by the petitioner prior to the public posting the report. The contents of the report may or may not be modified based on information shared during the meeting.

Step 9: Public Posting of the Staff Report

At least fifteen (15) days prior to the public hearing at which the RCBE will either grant or deny the charter, the staff report, including any findings regarding the petition, if applicable, will be published on the RCOE webpage in accordance with EDC 47605(b).

Step 10: RCBE Charter Schools Committee Meeting

The Charter Schools Committee consists of three RCBE Board Members that meet and discuss matters pertaining RCBE approved charter schools. The Charter Schools Committee will review the RCOE Staff Report of the proposed charter prior to the RCBE Meeting in which the petition will be considered. This information will be shared with all Board Members as they render a decision on authorizing to charter. RCOE staff and the petitioner are present to answer questions.

Step 11: RCBE Decision Meeting

Within 90 days of the submission of the petition, the RCBE will hold a public hearing at which the board either grants or denies the charter. The petitioner is provided equivalent time and procedures to present evidence and testimony to respond to the staff findings in accordance of EDC 47605(b). If applicable on an appeal, district staff will have an equal amount of time to address the RCBE.

| Petition Submission Checklist | |
|--|--------------------------|
| Petitioners are encouraged to review the following guidelines for petition submission to the Riverside County Board of Education. Review and completion of the following Legal Requirements (LR) and Best Practices (BP) will help to ensure a fluent process. | Reviewed/ Completed |
| If on appeal from a school district, the petition must be submitted within 30 days of denial (LR) | <input type="checkbox"/> |
| If on appeal from a school district, the appeal petition must be concurrently submitted to the denying district (LR) | <input type="checkbox"/> |
| The petitioner should attempt to submit prior to January in the year the school expects to commence if approved (BP) | <input type="checkbox"/> |
| If feasible, the petitioner should avoid submitting the petition immediately preceding any extended holidays (BP) | <input type="checkbox"/> |
| The petition must be submitted (digital or hard copy) to the Riverside County Office of Education (LR) | <input type="checkbox"/> |
| Along with the petition, the signed Certification Form (digital or hard copy) must be submitted to the Riverside County Office of Education (LR) | <input type="checkbox"/> |
| Provide RCOE with additional copies of the petition for staff review for a minimum one(1) digital copy and three (3) hard copies | <input type="checkbox"/> |

| Submission Locations | |
|---|--|
| Charter school petitions (along with Petitioner Certification) may be submitted in person at the Riverside County Office of Education main building during regular business hours or via email: | |
| In Person Submissions | Riverside County Office of Education 3940 Thirteenth Street Riverside, CA 92502 ATTN: Charter School Unit, Dr. Corey Loomis Monday-Friday, 8am-5pm (951) 826-6520 (Reception) |
| Online Submissions | To: Dr. Corey Loomis Director, Charter Schools Unit Email: cloomis@rcoe.us |



Riverside County Office of Education
CHARTER SCHOOL PETITION REVIEW RUBRIC

| Petitioner Certification <i>(must be completed by petitioner)</i> | |
|---|---|
| Education Code 47605(a)(1) A petition for the establishment of a charter school shall identify a single charter school that will operate within the geographic boundaries of that school district. A charter school may propose to operate at multiple sites within the school district if each location is identified in the charter school petition. The petition may be submitted to the governing board of the school district for review after either of the following conditions is met: | |
| (A) The petition is signed by a number of parents or legal guardians of pupils that is equivalent to at least one-half of the number of pupils that the charter school estimates will enroll in the charter school for its first year of operation | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| (B) The petition is signed by a number of teachers that is equivalent to at least one-half of the number of teachers that the charter school estimates will be employed at the charter school during its first year of operation | <input type="checkbox"/> YES <input type="checkbox"/> NO |

| | |
|---|------------------------------------|
| Education Code 47605(b) A petition is deemed received by the governing board of the school district for purposes of commencing the timelines described in this subdivision on the day the petitioner submits a petition to the district office, along with a signed certification that the petitioner deems the petition complete. | |
| Instructions to the Lead Petitioner: Please complete the following information, then sign and date below. | |
| Name of Proposed Charter School | |
| | |
| Name of Lead Petitioner | Position of Lead Petitioner |
| | |
| Phone | Email |
| | |
| Address | |
| | |

I hereby certify under the laws of the State of California and the United States that the foregoing petition and the information included on this page are deemed complete, true and correct. I understand and acknowledge that failure to provide accurate or complete information may subject the charter to revocation if later discovered and material to compliance with the Charter Schools Act.

| | | |
|--|--------------------------------------|------|
| Name of Lead Petitioner | Signature of Lead Petitioner | Date |
| | | |
| Name of County Office Personnel Receiving Petition | Signature of County Office Personnel | Date |
| | | |

| Petition Appeal Consideration & Acceptance EDC 47605(k)(1)(A) <i>(COE Office Use Only)</i> | | | | |
|--|--------------------------|-----|--------------------------|-----|
| Petitioner submitted the charter school petition appeal to the county board of education within 30 days of denial by the governing board of the school district as required by law | <input type="checkbox"/> | YES | <input type="checkbox"/> | NO |
| Petitioner submitted the charter school petition appeal to the school district which the original petition was submitted | <input type="checkbox"/> | YES | <input type="checkbox"/> | NO |
| The charter school petition appeal includes new information or changes to the original petition that was submitted to the district | <input type="checkbox"/> | YES | <input type="checkbox"/> | NO |
| This is a resubmission of the charter school's petition appeal. The school district governing board denied the petition after reconsideration of the petition's new or different material terms to its charter | <input type="checkbox"/> | YES | <input type="checkbox"/> | NO |
| | | | <input type="checkbox"/> | N/A |

If yes, the petition will be immediately remanded back to the district

Riverside County Office of Education

CHARTER SCHOOL PETITION REVIEW RUBRIC

| | | | |
|---|-------------------------|--------------------------|--------------------------|
| Name of Reviewer: | | | |
| Affirmations and Assurances | | | |
| The lead petitioner(s) certify in this section of the charter petition that the following information submitted for a California public charter school is true and accurate to the best of his/her/their knowledge and belief. | | | |
| Affirmations and Assurances | Legal Reference | Yes | No |
| The Petition identifies a single charter school. | EDC 47605(a)(1) | <input type="checkbox"/> | <input type="checkbox"/> |
| Affirms the school will be located within the boundaries of the school district to which the original charter petition was submitted (or within the county for Countywide Petitions). | EDC 47605(a)(1) | <input type="checkbox"/> | <input type="checkbox"/> |
| The Petition includes a prominent statement that a signature on the petition means that the parent or legal guardian is meaningfully interested in having his or her child or ward attend the charter school, or in the case of a teacher's signature, means that the teacher is meaningfully interested in teaching at the charter school. | EDC 47605(a)(3) | <input type="checkbox"/> | <input type="checkbox"/> |
| Affirms the petition does not constitute the conversion of a private school to the status of a public charter school. | EDC 47605(a)(1)(2) | <input type="checkbox"/> | <input type="checkbox"/> |
| Petition confirms whether or not it shall be deemed the exclusive public employer of the employees of the charter school for purposes of Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code. | EDC 47605(c)(6) | <input type="checkbox"/> | <input type="checkbox"/> |
| Assures the Charter School will meet all statewide standards and conduct the student assessments required, pursuant to EDC Section 60605, and any other statewide standards authorized in statute, or student assessments applicable to students in non-charter public schools. | EDC 47605(d)(1) | <input type="checkbox"/> | <input type="checkbox"/> |
| Affirms that the Charter School will, on a regular basis, consult with their parents, legal guardians, and teachers regarding the charter school's educational programs. | EDC 47605(d)(2) | <input type="checkbox"/> | <input type="checkbox"/> |
| Identifies how the charter school shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to, or continued enrollment at, the charter school. | EDC 47605(n) | <input type="checkbox"/> | <input type="checkbox"/> |
| Affirms the charter school, if approved, will comply with all federal, state and local laws and regulations that apply to the charter school, including, but not limited to those listed below: | | <input type="checkbox"/> | <input type="checkbox"/> |
| Affirmations per Subdivision (e) [EDC 47605(b)(4)] | Legal Reference | Yes | No |
| The Petition contains a declaration that it shall: | | | |
| Be non-sectarian in its programs, admissions policies, employment practices, and all other operations. | EDC 47605(e)(1) | <input type="checkbox"/> | <input type="checkbox"/> |
| Not charge tuition, or fees, for educational activities. | EDC 47605(e)(1) | <input type="checkbox"/> | <input type="checkbox"/> |
| Not discriminate on the basis of the characteristics listed in EDC Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics). | EDC 47605(e)(1) | <input type="checkbox"/> | <input type="checkbox"/> |
| Except as required by EDC Section 47605(d)(2), admission to the Charter School will not be determined according to the place of residence of the student or his or her parents or legal guardian within the State. | EDC 47605(e)(1) | <input type="checkbox"/> | <input type="checkbox"/> |
| Admit all students who wish to attend the Charter School. | EDC 47605(e)(2)(A) | <input type="checkbox"/> | <input type="checkbox"/> |
| Provide each application with equal chance of admission through a public random drawing process, in the case that the Charter School receives a greater number of applications than there are spaces for students. Preference shall be extended to pupils currently attending the charter school and pupils who reside in the school district except as provided for in Section 47614.5. | EDC 47605(e)(2)(B) | <input type="checkbox"/> | <input type="checkbox"/> |
| Include preferences consistent with federal law, the California Constitution and Section 200. | EDC 47605(d)(2)(B)(ii) | <input type="checkbox"/> | <input type="checkbox"/> |
| Not allow preferences to result in limiting enrollment access for pupils with disabilities, academically low-achieving pupils, English learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, foster youth, or pupils based on nationality, race, ethnicity, or sexual orientation. | EDC 47605(e)(2)(B)(iii) | <input type="checkbox"/> | <input type="checkbox"/> |

| | | | |
|---|-----------------------------|--------------------------|--------------------------|
| In accordance with Section 49011, not require mandatory parental volunteer hours as a criterion for admission or continued enrollment. | EDC 47605(e)(2)(B)(iv) | <input type="checkbox"/> | <input type="checkbox"/> |
| If a pupil is expelled or leaves the Charter School without graduating or completing the school year for any reason, the Charter School will notify the superintendent of the school district of the pupil's last known address within 30 days, and will, upon request, provide that school district with a copy of the cumulative record of the pupil, including a transcript of grades or report card and health information. (This only applies to pupils subject to compulsory full-time education pursuant to Section 48200) | EDC 47605(e)(3) | <input type="checkbox"/> | <input type="checkbox"/> |
| Not discourage a pupil from enrolling or seeking to enroll in the charter school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in clause (iii) of subparagraph (B) of paragraph (2). | EDC 47605(e)(4)(A) | <input type="checkbox"/> | <input type="checkbox"/> |
| Not request a pupil's records or require a parent, guardian, or pupil to submit the pupil's records to the charter school before enrollment. | EDC 47605(e)(4)(B) | <input type="checkbox"/> | <input type="checkbox"/> |
| Not encourage a pupil currently attending the charter school to disenroll from the charter school or transfer to another school for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in clause (iii) of subparagraph (B) of paragraph (2). (This shall not apply to actions taken by a school pursuant to the procedures described in EDC 47605(b)(5)(J).) | EDC 47605(e)(4)(C) | <input type="checkbox"/> | <input type="checkbox"/> |
| Shall post on the school's website the notice of the requirements of this paragraph as provided by the CDE, and will provide a parent or guardian, or a pupil if the pupil is 18 years or older, a copy of this notice at all of the following times: When a parent, guardian or pupil inquires about enrollment, before conducting a lottery and before disenrollment of a pupil. | EDC 47605(e)(4)(D)(i)-(iii) | <input type="checkbox"/> | <input type="checkbox"/> |
| Comments and/or Additional Questions: | | | |
| | | | |

The 15 Charter Elements

A. Description of Vision, Mission and Educational Program

| Evaluation Criteria: E.C. §47605(c)(5)(A) | | Evaluation Standard Met | | Located on Page(s) |
|---|---|--------------------------|--------------------------|--------------------|
| The petition describes, at minimum | | YES | NO | |
| 1. | Targeted Student Populations and Community Need | | | |
| a. | Students the charter school will attempt to educate and a demonstration of need for proposed educational program | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Grade levels and number of students the charter school plans to serve | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | A clear, concise school mission and vision statement that align with the needs of the target population | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | The needs and challenges of the student groups to be served | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Attendance | | | |
| a. | School year/academic calendar, number of school days and instructional minutes | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Attendance expectations and requirements, included enrollment projections | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Master/daily schedule and proposed bell schedule | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | What It Means to Be an Education Person in the 21st Century | | | |
| a. | Goals that are consistent with enabling all pupils to become or remain self-motivated, competent, lifelong learners | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | List of academic skills and qualities important for an educated person | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | List of general non-academic skills and qualities important for an educated person | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | How Learning Best Occurs/Instructional Design (including subgroup program) | | | |
| a. | A framework for instructional design that is aligned with the needs of the students that the charter has identified as its target student population | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Description of learning setting (e.g. site-based matriculation, independent study, technology-based education) | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Instructional approaches and strategies school will utilize that will enable the school's students, including subgroup populations such as English language learners (ELL), to master the content standards for the core curriculum areas adopted by the SBE | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | Process for developing or adopting curriculum and teaching methods | <input type="checkbox"/> | <input type="checkbox"/> | |
| e. | How the charter school will identify and meet the needs of English learners under EC section 52052 (a)(2) - the description demonstrates understanding of the likely ELL population - includes sound approach to identify and meet the needs of English learners including: Identification and assessment, English language development (designated instruction), schoolwide expectations to ensure access to the core curriculum (integrated instruction), parental involvement and professional development | <input type="checkbox"/> | <input type="checkbox"/> | |
| f. | How the charter school will identify and meet the needs of students with disabilities under EC section 52052 (a)(2) - includes sound approach to identify and meet the needs of students with disabilities -includes a special education plan including, but not limited to, the means by which the charter school will comply with the provisions of EC section 47641 | <input type="checkbox"/> | <input type="checkbox"/> | |
| g. | How the charter school will identify and meet the needs of students achieving substantially above or below grade level expectations, and other special student populations under EC section 52052 (a)(2) - the description demonstrates understanding of the likely ELL population - includes sound approach to identify and meet the needs of subgroup populations | <input type="checkbox"/> | <input type="checkbox"/> | |
| h. | A plan for professional development that aligns with the charter school's proposed program | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | Materials, Including Technology | | | |
| a. | How staffs' and students' technology resources are aligned to the instructional program and meet state assessment requirements | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | What materials are available to students: student-to-computer ratio appears reasonable | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | A description or plan for providing adaptive technology for SPED students | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | Common Core technology standards, digital assessments, and professional learning | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. | Annual Goals | | | |
| a. | Annual goals for all pupils and for each subgroup of pupils identified pursuant to section 52052 that apply to the grade levels served | <input type="checkbox"/> | <input type="checkbox"/> | |

| | | | | |
|---|--|--------------------------------|--------------------------|---------------------------|
| b. | <u>Goals tied to state priorities listed in EC section 52060(d) and LCAP, as appropriate</u> <u>- Additional priorities related to unique aspects of the proposed charter school program include goals and specific annual actions</u> | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Specific annual actions designed to achieve the stated goals | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. Description Requirements for Charter Schools Serving High School Students | | | | |
| a. | How parents will be informed about the transferability of courses to other public high schools | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | How parents will be informed about the eligibility of courses to meet college entrance requirements | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | How each student will receive information on how to complete and submit a FAFSA or California Dream Act Application at least once before the student enters grade 12 | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | How the exit outcomes will align to mission, curriculum and assessments | <input type="checkbox"/> | <input type="checkbox"/> | |
| e. | Affirmation that all students will have the opportunity to take courses that meet the 'A-G' requirements | <input type="checkbox"/> | <input type="checkbox"/> | |
| f. | Planned graduation requirements and WASC accreditation are defined | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| B. Measurable Student Outcomes | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(B)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | <u>Measurable pupil outcomes for all groups, i.e. specific assessments methods or tools listed for each exit outcome</u> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | <u>A description of how pupil outcomes align with the state priorities consistent with LCAP, as described in EC 52060(d), that apply for the grade levels served or the nature of the program</u> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | Specific annual actions designed to achieve the stated goals | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | Additional school priorities related to unique aspects of the proposed charter school program, with goals and specific annual actions | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | Description of how pupil outcomes will address state content and performance standards in core academic areas | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. | Description of how exit outcomes align to the mission and instructional design of the program | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. | Description or affirmation that "benchmark" skills and specific classroom-level skills will be developed | <input type="checkbox"/> | <input type="checkbox"/> | |
| 8. | <u>School-wide student performance goals students will achieve over a given period of time, including projected attendance levels, dropout percentage, and graduation rate goals</u> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| C. Student Progress Measurement | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(C.)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | <u>Assessment tools that include all required state and federal assessment (SBAC, ELPAC, etc.) for purposes of accountability</u> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | At least one assessment method or tool listed for each of the exit assessments | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | A variety of alternative assessment tools, including tools that employ objective means of assessment consistent with the measurable pupil outcomes | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | <u>Chosen assessments are appropriate for standards and skills the charter school seeks to measure</u> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | <u>A plan for collecting, analyzing/utilizing and reporting student/school performance to charter school staff and to students' parents and guardians, and for utilizing the data continuously to monitor and improve the charter school's educational program</u> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| D. Governance Structure | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(D)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | <u>Evidence of the charter school's incorporation as a nonprofit benefit corporation</u> | <input type="checkbox"/> | <input type="checkbox"/> | |

| | | | | |
|----|---|--------------------------|--------------------------|--|
| a. | Provides the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school. | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Includes a set of bylaws and basic policies | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Evidence that the organizational technical designs of the governance structure reflect: | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | A seriousness of purpose to ensure that the charter will become and remain a viable enterprise | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Understanding and assurance of compliance with Brown Act, Political Reform Act, Gov. Section 1090, including Brown Act posting of the board meeting agenda within legal timeline - access provided for public participation - posting of board meeting minutes and, or audio/ video recording | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | Key features of governing structure including, but not limited to: | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Delineation of roles and responsibilities of the governing board and staff | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | A clear description of the flexibility and level of autonomy the charter school has from the charter management organization over budget, expenditures, personnel, and daily operations | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Size/composition of board, board committees and/or advisory councils | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | Method for selecting initial board members and election/appointment for board member replacement | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | A process for involvement or input of parents/guardians in the governance of the charter school including: | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | A clear delineation of roles and responsibilities of parent councils, advisory committee or other supporting groups | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | A description how it shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance for, or continued at, the charter school | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | Specific policies and internal controls that will prevent fraud, embezzlement, and conflict of interest and ensures the implementation and monitoring of those policies | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. | A description and frequency of board trainings/workshops | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. | Other important legal or operational relationships between the charter school and granting agency | <input type="checkbox"/> | <input type="checkbox"/> | |

Comments by review team:

E. Employee Qualifications

| Evaluation Criteria: E.C. §47605(c)(5)(E) | | Evaluation Standard Met | | Located on Page(s) |
|---|---|--------------------------|--------------------------|--------------------|
| The petition describes, at minimum | | YES | NO | |
| 1. | Core and college preparatory teachers, and affirms all teachers will hold appropriate Commission on Teacher Credentialing certificates (new in July 1, 2020) | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Those positions that the charter school regards as key, and specifies the additional qualifications expected of individuals assigned to those positions, their responsibilities and accountability | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | General qualifications for the various categories of employees (e.g., other administrative, instructional support, non-instructional support). These qualifications shall be sufficient to ensure the health and safety of the charter school's faculty, staff, and students. | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | A clear plan for recruitment, selection, development and evaluation of staff and charter school leader | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | Roles and lines of authority for board and management positions | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. | Qualifications for non-core, non-college prep teaching positions staffed by non-certified teachers | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. | Proposed teacher to student ratio | <input type="checkbox"/> | <input type="checkbox"/> | |

Comments by review team:

F. Health and Safety Procedures

| Evaluation Criteria: §47605(c)(5)(F) | | Evaluation Standard Met | | Located on Page(s) |
|--|---|--------------------------|--------------------------|--------------------|
| The petition describes, at minimum | | YES | NO | |
| 1. | A comprehensive charter school safety plan and assurance that all charter school staff will be trained on this plan and that the plan will be updated annually | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Assurances that the charter school will require a criminal background clearance report, and proof of tuberculosis examination prior to employment | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | Assurances that the charter school will adopt procedures to prevent acts of bullying and cyberbullying, and make the CDE online training module available to all employees who interact with students | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | Affirmation that charter schools with grades 7-12 will adopt of a suicide prevention policy | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | Health and safety practices for students and staff | <input type="checkbox"/> | <input type="checkbox"/> | |

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|--|---|--------------------------|--------------------------|--------------------|
| 6. | References include health and safety related policies/procedures or the date by which they will be adopted and submitted to the authorizer | <input type="checkbox"/> | <input type="checkbox"/> | |
| 7. | Assurances on the compliance with ADA (Americans with Disabilities Act) | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| G. Racial and Ethnic Balance | | | | |
| Evaluation Criteria: E.C. §47605(c)(5)(G) | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | The means by which the charter school will achieve a balance of racial and ethnic pupils, special education pupils and English learner pupils, including redesignated English proficient pupils, as defined by the evaluation rubrics in Section 52064.5, that is reflective of the general population residing in the territorial jurisdiction of the school district to which the petition is submitted. | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Practices and policies appear likely to achieve racial and ethnic balance | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | The outreach strategies, identifying specifically who the targeted groups will be, including developed or planned benchmarks for achieving balance | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | Types of supports that will be provided to maintain enrollment balance (counselors, support staff, medical-related staff, etc.) | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| H. Admissions Requirements, If Applicable | | | | |
| Evaluation Criteria: §47605(c)(5)(H) | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | The following assurances: The charter school shall be nonsectarian in its programs, admission policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against a pupil on the basis of disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, equal rights, and opportunities in the educational institutions of the state | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | A clear description of admission policies that meet the state and federal permissive preferences | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | A clear description of how students in the community will be informed and given an equal opportunity to attend the charter school. All promotional material must clearly state the charter school will serve ALL students. | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | Proposed admissions and enrollment requirements, process and timeline, and includes: | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Information to be collected through the interest form, application form, and/or enrollment form | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Assures enrollment preferences will not require mandatory parent volunteer hours as a criteria for admission | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | Description of the public random drawing processes that coincide with state and federal laws | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. | Assurances that preferences, if given, are not likely to negatively impact the racial, ethnic and unduplicated balance the charter school strives to reflect | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| I. Annual Independent Financial Audits | | | | |
| Evaluation Criteria: §47605(c)(5)(I) | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | The manner in which the audit will be conducted | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Procedures to select and retain an independent auditor including: - qualifications that will be used for the selection of an independent auditor - assurance that the auditor will have experience in education finance | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | Assurance that the annual audit will employ generally accepted accounting principles | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | Scope and timing of audit, as well as distribution of completed audit to authorizer, county office, State Controller, California Department of Education, and/or other agencies required under law | <input type="checkbox"/> | <input type="checkbox"/> | |
| 5. | A process and timeline that the charter school will follow to address any audit findings and/or resolve audit exceptions | <input type="checkbox"/> | <input type="checkbox"/> | |
| 6. | Assurance that the charter school will satisfy any audit deficiencies to the satisfaction of the authorizer | <input type="checkbox"/> | <input type="checkbox"/> | |

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|--|---|--------------------------|--------------------------|--------------------|
| 7. | Who is responsible for contracting with and overseeing the independent audit | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| J. Suspension and Expulsion Procedures | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(J)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | A process for suspensions of fewer than 10 days, including | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Oral or written notice of the charges against the pupil | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | If the pupil denies the charges, an explanation of the evidence that supports the charges | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | How an opportunity will be provided for the pupil to present his/her rebuttal to the charges | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | A process for suspensions of 10 days or more and all other expulsions for disciplinary reasons, including: | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | A process of hearing adjudicated by a neutral officer within a reasonable number of days, and at which the pupil has the right to bring legal counsel or an advocate | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | A clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided written notice and that ensures the written notice shall be in the native language of the pupil or the pupil's parent or guardian | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | Understanding of relevant laws protecting constitutional rights of students | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Provides for due process for all students and demonstrates understanding of the rights of students with disabilities in regard to suspension, expulsion and involuntary dismissal | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Explanation of how authorizer may be involved in disciplinary matters | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| K. California State Teacher Retirement System | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(K)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | A statement of what retirement options will be offered to employees | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | STRS (if STRS, then all teachers must participate) | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | PERS | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Social Security | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Whether retirement will be offered with language clearly reflecting one of the following choices for each retirement system coverage will be offered to eligible employees - the charter school retains the option to elect the coverage at a future date - the charter school will not offer coverage | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | Who is responsible for ensuring that the appropriate arrangements for coverage have been made | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| L. Public School Attendance Alternatives | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(L)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | Attendance alternatives for students residing within the county who choose not to attend the charter school | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| M. Post-employee Rights of Employees | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(M)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |

| | | | | |
|--|---|--------------------------------|--------------------------|---------------------------|
| 1. | School district employee's return employment rights, including | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Whether, and how staff may resume employment within the district or authorizer | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | The ability to transfer sick/vacation leave to and from charter and another LEA | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Whether staff will continue to earn service credit (tenure) in district while employed at charter | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | Whether collective bargaining contracts of charter authorizer will be a controlling document | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| N. Dispute Resolution Procedures | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(N)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | A process for the charter and the authorizer to settle disputes relating to the provisions of the charter | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | The process by which charter will resolve internal complaints and disputes | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Includes Uniform Complaint procedures and description of how this process is communicated to parents, staff, and the community | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | Acknowledgement that except those disputes between the chartering authority and the charter school, all disputes involving the charter school shall be resolved by the charter school according to the charter school's own internal policies | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | Statement that if any such dispute concerns facts or circumstances that may be cause for revocation of the charter, the authorizer shall not be obligated by the terms of the dispute resolution process as a precondition to revocation | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |
| O. Closure Procedures | | | | |
| <u>Evaluation Criteria: E.C. §47605(c)(5)(O)</u> | | Evaluation Standard Met | | Located on Page(s) |
| The petition describes, at minimum | | YES | NO | |
| 1. | The procedures to be used if the charter school closes, including: | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | Who is the responsible entity/person that will conduct closure-related activities | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Process for submission of final financial reports, expenditure reports for entitlement grants, and the filing of any required final expenditure and performance reports | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2. | The maintenance plan for pupil records and the manner in which parents/guardians may obtain copies of pupil records if the charter school closes, including how information will be preserved and transferred. | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3. | A process of how charter will ensure a final audit of the charter school | <input type="checkbox"/> | <input type="checkbox"/> | |
| a. | An assurance it will be conducted within six months of closure | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | The disposition of the charter school's assets | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Plans for disposing net assets | <input type="checkbox"/> | <input type="checkbox"/> | |
| 4. | The transfer and maintenance of personnel records in accordance with applicable law | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |

Required Supplemental Criteria

Financial/Administrative Plan

[Evaluation Criteria: E.C. §47605\(h\)](#)

The petition describes, at minimum

**Evaluation
Standard Met**

Yes

No

**Located
on Page
(s)**

1. A Reasonable First Year Operational Budget

a. Annual revenues and expenditures clearly identified by source

☐
☐

b. Revenue assumptions in alignment with applicable state and federal funding formulas

☐
☐

c. Expenditure assumptions that reflect the school design plan

☐
☐

d. Expenditure assumptions that reflect market costs

☐
☐

e. Revenues from grants or other proposed fundraising that are not critical to fiscal solvency

☐
☐

f. Minimum reserve level or projected ending fund balance (the larger of 3% of expenditures, or \$25,000)

☐
☐

g. If expenditures exceed revenues in first year of operations, identifies sources of capital sufficient to cover deficits until the budget is projected to balance

☐
☐

h. Expenditures for property and liability insurance that name the district/authorizer as additional insured (and/or a hold harmless agreement)

☐
☐

i. Expenditures for reasonably expected legal services

☐
☐

j. Expenditures for special education excess costs consistent with current experiences in the school district/county office

☐
☐

k. Expenditures for facilities – if specific facilities not secured, reasonable projected cost

☐
☐

l. Expenditures for required student meals that meet federal nutritional requirements

☐
☐

m. The alignment of LCAP expenditures with the charter's budget

☐
☐

Comments by review team:

2. Financial Projections Include a Clear Description of Planning Assumptions

a. Revenues and expenditures correlate with the number/types of students by grade level in budget

☐
☐

b. Expenditure assumptions correlate with the amount of staff in budget

☐
☐

c. Expenditure assumptions correlate with the facility needs in budget

☐
☐

d. Expenditure assumptions in alignment with overall school design plan

☐
☐

e. Revenues based on state and federal funding guidelines

☐
☐

f. Revenues based on reasonable potential growth in local, state and federal categories

☐
☐

g. Revenues based on reasonable student growth projections

☐
☐

h. Revenue from sources such as grants, loans, donations and other non-guaranteed funds not necessary for the charter to maintain fiscal solvency

☐
☐

i. Timeline for any referenced grant applications to be submitted and funded

☐
☐

| | | | | |
|---------------------------------|---|--------------------------|--------------------------|--|
| j. | Positive reserves are maintained in all three years | <input type="checkbox"/> | <input type="checkbox"/> | |
| k. | Fund balances are positive, or sources of supplemental working capital are identified | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | |
| | | | | |

SAMPLE

| Financial/Administrative Plan | | | | | |
|--|--|--|--------------------------|--------------------------|---------------------|
| Evaluation Criteria: E.C. §47605(h) | | | Evaluation Standard Met | | Located on Page (s) |
| The petition describes, at minimum | | | Yes | No | |
| 3. Start-Up Costs | | | | | |
| a. | Reasonable allocation for all major start-up costs including: - staffing - facilities - equipment and supplies - professional services (i.e. food services, etc.) - technology materials - assessment systems/materials - legal costs | | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | In alignment with overall school design plan | | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Potential funding sources | | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | Timeline allows for grant applications and fundraising efforts to be completed in time, if included in start-up costs | | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | | |
| | | | | | |
| 4. Cash Flow Projections for First 3 Years | | | | | |
| a. | Monthly projection of revenue receipts in line with local/state/federal funding disbursements | | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Expenditures projected by month and corresponds with typical/reasonable schedules | | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Balance sheet accounts projected by month | | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | Show positive cash balance each month and/or identify sources of working capital | | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | | |
| | | | | | |
| 5. Structure for Administrative Services and Operations | | | | | |
| a. | Outline or process for how personnel transactions will be conducted, (i.e. hiring, payroll, leaves and retirement) | | <input type="checkbox"/> | <input type="checkbox"/> | |
| b. | Accounting and payroll processes that reflect an understanding of school business practices and expertise to carry out the necessary functions | | <input type="checkbox"/> | <input type="checkbox"/> | |
| c. | Plan and timeline to develop and assemble school business practices and expertise | | <input type="checkbox"/> | <input type="checkbox"/> | |
| d. | Explanation of how school intends to manage risk, including any policies and procedures | | <input type="checkbox"/> | <input type="checkbox"/> | |
| e. | If operated by a non-profit organization, affirms will provide additional 501(c)(3) fiscal reports | | <input type="checkbox"/> | <input type="checkbox"/> | |
| Comments by review team: | | | | | |
| | | | | | |

| Charter Management Organization, i.e. Entities Managing Charter Schools | | | | | |
|---|---|--|-------------------------|----|---------------------|
| Evaluation Criteria: E.C. §47605(h) | | | Evaluation Standard Met | | Located on Page (s) |
| The petition describes, at minimum | | | Yes | No | |
| 1. | Name and relationship of CMO to charter school, including <ul style="list-style-type: none"> - roles - responsibilities - payment structure - conditions for renewal/termination - investment disclosure | | | | |
| 2. | CMO's role in the financial management of the charter and the associated internal controls | | | | |
| 3. | Other schools and/or companies managed by the CMO | | | | |
| 4. | CMO's history, philosophy, and past results operating other schools and/or companies | | | | |
| 5. | CMO's 990s for up to prior three years | | | | |
| 6. | Back office provider and description of support utilized by the charter | | | | |
| 7. | Affirmation that the CMO/back office provider will provide timely submissions of calendar of due date items | | | | |
| 8. | Affirmation that the CMO/back office provider will provide timely submissions of request for information items | | | | |
| Comments by review team: | | | | | |
| | | | | | |

| Facilities | | | | | |
|--|---|--|-------------------------|----|---------------------|
| Evaluation Criteria: E.C. §47605(h) | | | Evaluation Standard Met | | Located on Page (s) |
| The petition describes, at minimum | | | Yes | No | |
| 1. Location of Facility | | | | | |
| a. | The types and the location of the charter school facility that the petitioner proposes to operate, including - size and resources - safety - educational suitability | | | | |
| b. | The address of the facility or a schedule for securing the facility, including the person responsible for securing the location | | | | |
| c. | Assessment and analysis of anticipated facilities needs and viability of potential sites | | | | |
| 2. Current and Projected Availability | | | | | |
| a. | Current and projected availability of each charter school site, and schedule for securing the facility | | | | |
| b. | Assurances of all legal compliance with health and safety, ADA, and applicable building codes | | | | |
| c. | Adequate budget for anticipated costs, including renovation, rent, maintenance and utilities | | | | |
| d. | Statement whether a request will be made for use of authorizer-owned facilities | | | | |
| e. | Lease or occupation agreement for privately obtained facilities, and/or provides a copy of the lease agreement | | | | |
| Comments by review team: | | | | | |
| | | | | | |

| Impact Statement | | | | |
|--|---|-------------------------|----|---------------------|
| Evaluation Criteria: E.C. §47605(h) | | Evaluation Standard Met | | Located on Page (s) |
| The petition describes, at minimum | | Yes | No | |
| 1. | Number of students anticipated to enroll | | | |
| 2. | Identification of whether charter will request to purchase support services from authorizer | | | |
| 3. | Affirmation there will be an Memorandum of Understanding between the authorizer and charter school | | | |
| 4. | Processes and policies between charter and authorizer | | | |
| a. | Includes process, activities and associated fees for oversight of charter | | | |
| b. | Includes processes, timelines, and evaluation criteria for annual review and site visits | | | |
| c. | Includes regular, ongoing fiscal and programmatic performance monitoring and reporting | | | |
| d. | Includes process, timelines and evaluation criteria for charter renewal | | | |
| e. | Outlines other important legal or operational relationships between authorizer and charter school | | | |
| 5. | Criteria and procedure for the selection of a contractor, if applicable, including - process for determining necessary expertise - selection of the contractor or contractors, if applicable | | | |
| 6. | Potential civil liability effects, if any, upon the school and the authorizer | | | |
| Comments by review team: | | | | |
| | | | | |
| Community Impact | | | | |
| Evaluation Criteria: E.C. §47605(c)(7) | | Evaluation Standard Met | | Located on Page (s) |
| The petition describes, at minimum | | Yes | No | |
| 1. | How the charter school will not substantially undermine existing school district services, academic offerings, or programmatic offerings | | | |
| 2. | Whether the charter school petition duplicates a program currently offered by the district, and the existing program has sufficient capacity for the pupils proposed to be served within reasonable proximity to where the charter school intends to locate | | | |
| Comments by review team: | | | | |

| Special Education | | | | |
|---|---|--|--|---------------------|
| Evaluation Criteria: E.C. §47641(a) and E.C. §47646 | | | | Located on Page (s) |
| The petition describes, at minimum | | | | |
| | | | | Yes |
| | | | | No |
| 1. | The school's special education structure (3 options) a. charter school will be an independent LEA for special education purposes, or b. charter school will be a school within the district, or c. the charter school will be a SELPA | | | |
| 2. | How special education services will be provided consistent with SELPA Plan and/or policies and procedures. a. includes a fiscal allocation plan in alignment with the SELPA the charter plans to join | | | |
| 3. | Affirmation that the charter school will assume full responsibility for appropriate accommodation to address the needs of any student | | | |
| 4. | Acknowledgment that the charter is responsible for providing special education, instruction and related services to the students enrolled in the school regardless of students' district of residence | | | |
| 5. | The process for notifying district of residence and authorizing LEA when a special education student enrolls, becomes eligible, ineligible and/or leaves the charter | | | |
| 6. | The transition to or from a district when a student with an IEP enrolls in or transfers out of the charter | | | |
| 7. | Evidence that the school has consulted with a SELPA, such as a letter from SELPA confirming receipt of application | | | |
| 8. | Includes the following assurances | | | |
| a. | The charter will comply with all provisions of IDEA | | | |
| b. | No student will be denied admission based on disability or lack of available services | | | |
| c. | A Student Study Team process will be implemented | | | |
| d. | Any student potentially in need of Section 504 services will receive such services | | | |
| Comments by review team: | | | | |
| | | | | |
| If the charter will not be an independent LEA | | | | |
| 1. | Clarifies in charter petition or a Memorandum of Understanding the responsibilities of each party for service delivery, including: - Referral - Assessment - Instruction - Due Process - Agreements describing allocation of actual and excess costs - An assertion that the charter will be fiscally responsible for its fair share of any encroachment on general funds | | | |
| If the charter school is an independent LEA within a SELPA | | | | |
| 1. | Notifies SELPA Director of intent to participate prior to February 1 of the preceding school year | | | |
| 2. | Includes current operating budget in accordance with E.C. §42130 and E.C. §42131 | | | |

| | | | | |
|--------------------------|--|--|--|--|
| 3. | Understands that the charter school is fiscally responsible for fair share of any encroachment on general funds | | | |
| 4. | Asserts responsibility for any legal fees relating to the application and assurances process | | | |
| 5. | Demonstrates it is located within SELPA's geographical boundaries | | | |
| 6. | Asserts all instruction will be in a safe environment | | | |
| 7. | Affirms the terms of the Agreement will be met regarding the organization, implementation, administration and operation of the SELPA | | | |
| Comments by review team: | | | | |
| | | | | |

SAMPLE