COUNTYWIDE CHARTER SCHOOL PETITION EVALUATION MATRIX

**School Name:**

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| **California Education Code 47605.6** |
| A county board of education may also approve a petition for the operation of a charter school that operates at one or more sites within the geographic boundaries of the county and that provides instructional services that are not generally provided by a county office of education. A county board of education may approve a countywide charter only if it finds, in addition to the other requirements of this section, that the educational services to be provided by the charter school will offer services to a pupil population that will benefit from those services and that cannot be served as well by a charter school that operates in only one school district in the county. A petition for the establishment of a countywide charter school pursuant to this subdivision may be circulated throughout the county by any one or more persons seeking to establish the charter school. The county board of education shall publish all staff recommendations, including the recommended findings, regarding the petition at least 15 days before the public hearing at which the county board of education will either grant or deny the charter. At the public hearing at which the county board of education will either grant or deny the charter, petitioners shall have equivalent time and procedures to present evidence and testimony to respond to the staff recommendations and findings. A county board of education may impose any additional requirements beyond those required by this section that it considers necessary for the sound operation of a countywide charter school. A county board of education may grant a charter for the operation of a charter school under this part only if it is satisfied that granting the charter is consistent with sound educational practice and that the charter school has reasonable justification for why it could not be established by petition to a school district pursuant to Section 47605.The county board of education shall deny a petition for the establishment of a charter school if it finds one or more of the following:1. The charter school presents an unsound educational program for the pupils to be enrolled in the charter school.
2. The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.
3. The petition does not contain the number of signatures required by subdivision (a).
4. The petition does not contain an affirmation of each of the conditions described in subdivision (e).
5. The petition does not contain reasonably comprehensive descriptions of all of the required elements.
6. The petition does not contain a declaration of whether or not the charter school shall be deemed the exclusive public employer of the employees of the charter school for purposes of the Educational Employment Relations Act (Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code).
7. Any other basis that the county board of education finds justifies the denial of the petition.
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**Required Supplemental Criteria**

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| **Countywide Benefit Justification** |
| Evaluation Criteria: EC § 47605.6(a)(1) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. The educational services to be provided by the charter school will offer services to a pupil population that will benefit from those services and that cannot be served as well by a charter school that operates in only one school district in the county.
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| 1. The charter school proposes to operate at one or more sites within the geographic boundaries of the county.
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| 1. The charter school provides instructional services that are not generally provided by a county office of education.
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| 1. The petition is signed by a number of parents or guardians of pupils residing within the county that is equivalent to at least one-half of the number of pupils that the charter school estimates will enroll in the school for its first year of operation and each of the school districts where the charter school petitioner proposes to operate a facility has received at least 30 days’ notice of the petitioner’s intent to operate a charter school pursuant to this section.

ORThe 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 school during its first year of operation and each of the school districts where the charter school petitioner proposes to operate a facility has received at least 30 days’ notice of the petitioner’s intent to operate a charter school pursuant to this section. |  |  |  |

**Required Charter Petition Elements**

**Criteria in RED are descriptions that are required under law to be included in the charter petition.**

**Criteria in BLACK are descriptions strongly suggested to be included to ensure that the charter petition is reasonably comprehensive.**

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| **A. Description of Vision, Mission and Educational Program** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(A)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **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 |  |  |  |
| b. Grade levels and number of students the charter school plans to serve |  |  |  |
| c. A clear, concise school mission and vision statement that aligns with the target population |  |  |  |
| d. The needs and challenges of the student groups to be served |  |  |  |
| **2. Attendance** |
| a. School year/academic calendar, number of school days and instructional minutes |  |  |  |
| b. Master/daily schedule and proposed bell schedule |  |  |  |
| **3. What It Means to Be an Educated Person in the 21st Century** |
| a. Goals that are consistent with enabling all pupils to become or remain self-motivated, competent, lifelong learners |  |  |  |
| b. List of academic skills and qualities important for an educated person |  |  |  |
| c. List of general non-academic skills and qualities important for an educated person |  |  |  |
| **4.** [**How Learning Best Occurs/Instructional Design, Including Subgroup Program CCR § 11967.5.1. (f)(C)**](https://govt.westlaw.com/calregs/Document/I106524000BDC11E1A0DDFCA155337C92?viewType=FullText&originationContext=documenttoc&transitionType=StatuteNavigator&contextData=(sc.Default) |
| 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 |  |  |  |
| b. Description of learning setting (e.g. site-based matriculation, independent study, tech-based) |  |  |  |
| 1. How the charter school will identify and meet the needs of students with disabilities, ELLs, students achieving substantially above or below grade level expectations, and other special student populations
	* The description demonstrates understanding of the likely ELL population
	* Includes sound approach to identify and meet the needs of subgroup populations
 |  |  |  |
| d. Special education plan including, but not limited to, the means by which the charter school will comply with the provisions of EC section 47641 |  |  |  |
| e. Instructional approaches and strategies the school will utilize that will enable students, including subgroup populations such as English language learners (ELL), to master the content standards for the core curriculum areas adopted by the SBE |  |  |  |
| f. Process for developing or adopting curriculum and teaching methods |  |  |  |
| g. A plan for professional development that aligns with the charter school's proposed program |  |  |  |
| **5. Materials, Including Technology** |
| a. How staff and students' technology resources are aligned to the instructional program and meet state assessment requirements |  |  |  |
| b. What materials are available to students; Student-to-computer ratio appears reasonable |  |  |  |
| c. A description or plan for providing adaptive technology for SPED students |  |  |  |
| d. Common Core technology standards, digital assessments and professional learning |  |  |  |
| **6.** [**Annual Goals**](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=EDC&division=4.&title=2.&part=28.&chapter=6.1.&article=4.5) |
| a. Annual goals for all pupils and for each subgroup of pupils identified pursuant to EC section 52052 that apply to the grade levels served |  |  |  |
| b. [Goals tied to state priorities listed in EC section 52060(d) and LCAP, as appropriate](https://www.cde.ca.gov/fg/aa/lc/statepriorityresources.asp)- [Additional priorities related to unique aspects of the proposed charter school program](https://www.cde.ca.gov/fg/aa/lc/statepriorityresources.asp) [include goals and specific annual actions](https://www.cde.ca.gov/fg/aa/lc/statepriorityresources.asp) |  |  |  |
| c. Specific annual actions designed to achieve the stated goals |  |  |  |
| **7. Charter Schools Serving High School Students** |
| a. How parents will be informed about the transferability of courses to other public high schools |  |  |  |
| b. How parents will be informed about the eligibility of courses to meet college entrance requirements |  |  |  |
| 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 |  |  |  |
| d. How the exit outcomes will align to mission, curriculum and assessments |  |  |  |
| e. Affirmation that all students will have the opportunity to take courses that meet the 'A-G' requirements |  |  |  |
| f. Planned graduation requirements and WASC accreditation are defined |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **B. Measurable Student Outcomes** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(B)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. [Measurable pupil outcomes for all groups, i.e. specific assessment methods or tools listed for](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=47607) [each exit outcome](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=47607) |  |  |  |
| 2. [A description of how pupil outcomes align with the state priorities consistent with LCAP, as](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=52060) [described in EC 52060(d), that apply for the grade levels served or the nature of the program](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=52060) |  |  |  |
| 3. Specific annual actions designed to achieve the stated goals |  |  |  |
| 4. Additional school priorities related to unique aspects of the proposed charter school program, with goals and specific annual actions |  |  |  |
| 5. School-wide student performance goals students will achieve over a given period of time, including projected attendance levels, dropout percentage, and graduation rate goals |  |  |  |
| 6. Description of how pupil outcomes will address state content and performance standards in core academic areas |  |  |  |
| 7. Description of how exit outcomes align to the mission and instructional design of the program |  |  |  |
| 8. Description or affirmation that "benchmark" skills and specific classroom-level skills will be developed |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **C. Student Progress Measurement** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(C)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Assessment tools that include all required state and federal assessment (SBAC, ELPAC, etc.) for purposes of accountability |  |  |  |
| 2. 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 |  |  |  |
| 3. At least one assessment method or tool listed for each of the exit assessments |  |  |  |
| 4. A variety of alternative assessment tools, including tools that employ objective means of assessment consistent with the measurable pupil outcomes |  |  |  |
| 5. Chosen assessments are appropriate for standards and skills the charter school seeks to measure |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **D. Governance Structure** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(E)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Evidence of the charter school's incorporation as a nonprofit benefit corporation |  |  |  |
| a. Provides the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school |  |  |  |
| b. Includes a set of bylaws and basic policies |  |  |  |
| 1. Evidence that the organizational technical designs of the governance structure reflect:
	* A seriousness of purpose to ensure that the charter will become and remain a viable enterprise
	* Understanding and assurance of compliance with open meeting requirements
 |  |  |  |
| 3. Key features of the governing structure: |  |  |  |
| a. Delineation of roles and responsibilities of the governing board and staff |  |  |  |
| 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 |  |  |  |
| c. Size/composition of board, board committees and/or advisory councils |  |  |  |
| d. Method for selecting initial board members and election/appointment for board member replacement |  |  |  |
| 4. A process for involvement or input of parents/guardians in the governance of the charter school: |  |  |  |
| a. A clear delineation of roles and responsibilities of parent councils, advisory committee orother supporting groups |  |  |  |
| b. A description of how it shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance or continuationat the charter school |  |  |  |
| 5. Specific policies and internal controls that will prevent fraud, embezzlement, and conflict of interest and ensures the implementation and monitoring of those policies |  |  |  |
| 6. A description and frequency of board trainings/workshops |  |  |  |
| 7. Other important legal or operational relationships between the charter school and granting agency |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |  |  |  |

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| **E. Employee Qualifications** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(F)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Affirms all teachers hold appropriate Commission on Teacher Credentialing certificates, permit or other document required for the teacher’s certificated assignment |  |  |  |
| 2. Those positions that the charter school regards as key and specifies the additionalqualifications expected of individuals assigned to those positions, their responsibilities and accountability |  |  |  |
| 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 |  |  |  |
| 4. A clear plan for recruitment, selection, development and evaluation of staff and charter school leader |  |  |  |
| 5. Roles and lines of authority for board and management positions |  |  |  |
| 6. Proposed teacher to student ratio |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **F. Health and Safety Procedures** |
| [Evaluation Criteria: § 47605.6(b)(5)(G)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. A comprehensive charter school safety plan, which shall include topics listed in EC sections 32282(a)(2)(A)-(J), and assurance that all charter school staff will be trained on this plan and that the plan will be updated annually per EC section 32282 |  |  |  |
| 2. Assurances that the charter school will require a criminal background clearance report, andproof of tuberculosis examination prior to employment |  |  |  |
| 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 |  |  |  |
| 4. Affirmation that charter schools with grades 7-12 will adopt a suicide prevention policy |  |  |  |
| 5. Health and safety practices for students and staff that include health and safety related policies/procedures or the date by which they will be adopted and submitted to the authorizer |  |  |  |
| 6. Assurances on the compliance with ADA (Americans with Disabilities Act) |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

**G. Racial and Ethnic Balance**

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| [Evaluation Criteria: EC § 47605.6(b)(5)(H)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Specific practices/policies the charter school will implement to achieve a balance of racial and ethnic pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils that is reflective of the general population residing within the territorial jurisdiction of the district |  |  |  |
| 2. The outreach strategies, identifying specifically who the targeted groups will be, includingdeveloped or planned benchmarks for achieving balance |  |  |  |
| 3. Types of supports that will be provided to maintain enrollment balance (counselors, support staff, medical-related staff, etc.) |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **H. Admissions Requirements, If Applicable** |
| Evaluation Criteria: § 47605.6(b)(5)(M) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. An assurance that the charter school shall be nonsectarian in its programs, admission policies, employment practices, and all other operations |  |  |  |
| 2. An assurance that the charter school shall not charge tuition |  |  |  |
| 3. An assurance that the charter school 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 |  |  |  |
| 4. A clear description of admission policies that meet the state and federal permissive preferences |  |  |  |
| 5. Enrollment preferences will not require mandatory parent volunteer hours as a criteria for admission |  |  |  |
| 6. An assurance that the charter school shall admit all pupils who wish to attend the charter school |  |  |  |
| 7. Description of the public random drawing processes that coincide with state and federal laws if the number of pupils who wish to attend the charter school exceeds the charter school’s capacity |  |  |  |
| 8. Assurances that preferences, if given, will not 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 |  |  |  |
| 9. A clear description of how the charter school will notify the superintendent of the school district of the pupil’s last known address within 30 days, if a pupil is expelled or leaves the charterschool without graduating or completing the school year for any reason |  |  |  |
| 10. An assurance that the charter school will not discourage a pupil from enrolling or seeking to enroll in the charter school or encourage a pupil to disenroll from the charter school or to 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 EC 47605(e)(2)(B)(iii) |  |  |  |
| 11. An assurance that a charter school shall 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 |  |  |  |
| 12. 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 |  |  |  |
| 13. Proposed admissions and enrollment requirements, process and timeline |  |  |  |
| 14. Information to be collected through the interest form, application form, and/or enrollment form |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |  |  |  |

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| **I. Annual Independent Financial Audits** |
| [Evaluation Criteria: § 47605.6(b)(5)(l)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. The manner in which the audit will be conducted |  |  |  |
| 2. Assurance that the annual audit will employ generally accepted accounting principles |  |  |  |
| 3. 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 |  |  |  |
| 4. A process and timeline that the charter school will follow to address any audit findings and/or resolve audit exceptions |  |  |  |
| 5. Assurance that the charter school will satisfy any audit deficiencies to the satisfaction of the authorizer |  |  |  |
| 1. 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
 |  |  |  |
| 7. Proposed individual responsible for contracting with and overseeing the independent audit |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **J. Suspension and Expulsion Procedures** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(J)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. The process for suspensions of fewer than 10 days, including |  |  |  |
| a. Oral and/or written notice of the charges against the pupil |  |  |  |
| b. If the pupil denies the charges, an explanation of the evidence that supports the charges |  |  |  |
| c. How an opportunity will be provided for the pupil to present his/her rebuttal to the charges |  |  |  |
| 2. A process for suspensions of 10 days or more and all other expulsions for disciplinary reasons, including: |  |  |  |
| a. Timely, written notice of the charges against the pupil and an explanation of the pupil’s basic rights |  |  |  |
| b. A process of hearing adjudicated by a neutral officer within a reasonable number of days, andat which the pupil has the right to bring legal counsel or an advocate |  |  |  |
| 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 |  |  |  |
| 4. Understanding of relevant laws protecting constitutional rights of students |  |  |  |
| 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 |  |  |  |
| b. Explanation of how authorizer may be involved in disciplinary matters |  |  |  |
| **COMMENTS BY REVIEW TEAM:**  |

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| **K. California State Teacher Retirement System** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(K)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **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: STRS (if STRS, then all teachers must participate), PERS, Social Security |  |  |  |
| 1. 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
 |  |  |  |
| 3. Individual responsible for ensuring that the appropriate arrangements for coverage have been made |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **L. Public School Attendance Alternatives** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(N)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| Attendance alternatives for students residing within the county who choose not to attend the charter school |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **M. Post-employment Rights of Employees** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(O)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. School district employee’s return employment rights, including |  |  |  |
| a. Whether, and how staff may resume employment within the district or authorizer |  |  |  |
| b. The ability to transfer sick/vacation leave to and from charter and another LEA |  |  |  |
| c. Whether staff will continue to earn service credit (tenure) in district while employed at charter |  |  |  |
| 2. Whether collective bargaining contracts of charter authorizer will be a controlling document |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **N. Dispute Resolution Procedures** |
| Evaluation Criteria: EC § 47605.6(b)(5)(L) | **Evaluation Standard Met** | **Located on** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** | **Page(s)** |
| 1. A process for the charter and the authorizer to settle disputes relating to the provisions of the charter |  |  |  |
| 2. The process by which the charter will resolve internal complaints and disputes |  |  |  |
| a. Includes Uniform Complaint procedures and description of how this process is communicated to parents, staff, and the community |  |  |  |
| 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 |  |  |  |
| 4. Statement that if any such dispute concerns facts or circumstances that may be cause forrevocation of the charter, the authorizer shall not be obligated by the terms of the dispute resolution process as a precondition to revocation |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **O. Closure Procedures** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(P)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **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: |  |  |  |
| a. Who is the responsible entity/person that will conduct closure-related activities |  |  |  |
| b. Process for submission of final financial reports, expenditure reports for entitlement grants, and the filing of any required final expenditure and performance reports |  |  |  |
| 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 |  |  |  |
| 3. A process of how charter will ensure a final audit of the charter school |  |  |  |
| a. An assurance it will be conducted within six months of closure |  |  |  |
| b. The disposition of the charter school's assets |  |  |  |
| c. Plans for disposing net assets |  |  |  |
| 4. The transfer and maintenance of personnel records in accordance with applicable law |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **Financial/Administrative Plan** |
| [Evaluation Criteria: EC § 47605.6(h)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on****Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. A 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 and projected positive ending fund balance (the larger of 3% of expenditures, or $25,000) |  |  |  |
| g. If expenditures exceed revenues in the 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 |  |  |  |
| 2. 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, assessmentsystems/materials and legal costs |  |  |  |
| b. In alignment with overall school design plan |  |  |  |
| c. Potential funding sources |  |  |  |
| d. Timeline allows for grant applications and fundraising efforts to be completed in time, if included in start-up costs |  |  |  |
| 3. Cash flow and financial projections for first 3 years |  |  |  |
| a. Monthly projection of revenue receipts in line with local/state/federal funding disbursements |  |  |  |
| b. Expenditures projected by month and corresponds with typical/reasonable schedules |  |  |  |
| c. Balance sheet accounts projected by month |  |  |  |
| d. Show positive cash balance each month and/or identify sources of working capital |  |  |  |
| 4. 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 |  |  |  |
| k. Fund balances are positive, or sources of supplemental working capital are identified |  |  |  |
| 5. Manner in which administrative services and operations are provided |  |  |  |
| a. Outline or process for how personnel transactions will be conducted, (i.e. hiring, payroll, leaves and retirement) |  |  |  |
| b. Accounting and payroll processes that reflect an understanding of school business practices and expertise to carry out the necessary functions |  |  |  |
| c. Plan and timeline to develop and assemble school business practices and expertise |  |  |  |
| d. Explanation of how school intends to manage risk, including any policies and procedures |  |  |  |
| e. If operated by a non-profit organization, affirms will provide additional 501(c)(3) fiscal reports |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **Charter Management Organization, i.e. Entities Managing Charter Schools** |
| [Evaluation Criteria: EC § 47605(h)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Name and relationship of CMO to charter school, including 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 Form 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:** |

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| **Facilities** |
| [Evaluation Criteria: EC § 47605.6(b)(5)(D)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on****Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. The location of each charter school facility that the petitioner proposes to operate |  |  |  |
| 2. Size, resources, safety and educational suitability of facility |  |  |  |
| 3. The address of the facility or a schedule for securing the facility, including the person responsible for securing the location |  |  |  |
| 4. Assessment and analysis of anticipated facilities needs and viability of potential sites |  |  |  |
| 5. Assurances of all legal compliance with health and safety, ADA, and applicable building codes |  |  |  |
| 6. Adequate budget for anticipated costs, including renovation, rent, maintenance and utilities |  |  |  |
| 7. Statement whether a request will be made for use of authorizer-owned facilities |  |  |  |
| 8. Lease or occupation agreement for privately obtained facilities, and/or provides a copy of the lease agreement |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **Impact Statement** |
| [Evaluation Criteria: EC § 47605.6(h)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Proposed operation and potential effects of the charter school, including but not limited to the facilities to be used by the charter school, the manner in which administrative services of the charter school are to be provided, and the potential civil liability effects, if any, upon the charter school, any school district where the charter school may operate, and upon the county board of education.  |  |  |  |
| 2. Number of students anticipated to enroll |  |  |  |
| 3. Identification of whether charter will request to purchase support services from authorizer |  |  |  |
| 4. Affirmation there will be a Memorandum of Understanding between the authorizer and charter school |  |  |  |
| 5. 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 |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |  |  |  |

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| **Special Education** |
| [Evaluation Criteria: EC § 47641(a) and EC § 47646](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47641.&lawCode=EDC) | **Evaluation Standard Met** | **Located on****Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. The school's special education structure (independent LEA for special education purposes, a school within the district, or 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 accommodations 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 and from a district when a student with an IEP enrolls in or transfers out of the charter |  |  |  |
| 7. Assurance that the charter school will comply with all provisions of IDEA |  |  |  |
| 8. Assurance that no student will be denied admission based on disability or lack of available services |  |  |  |
| 9. Assurance that the charter school will implement a Student Study Team process |  |  |  |
| 10. Assurance that any student potentially in need of Section 504 services will receive such services |  |  |  |
| 11. Evidence that the school has consulted with a SELPA, such as a letter from SELPA confirming receipt of application |  |  |  |
| **If the charter will not be an independent LEA** |
| 1. Clarifies in the charter petition or a Memorandum of Understanding the responsibilities of each party for service delivery, including referral, assessment, instruction, due process and agreements describing allocation of actual excess costs |  |  |  |
| 2. 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 EC §§ 42130 and 42131](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=42131.&lawCode=EDC) |  |  |  |
| 3. Understands that the charter school is fiscally responsible for its 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:** |

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| **Required Declaration** |
| [Evaluation Criteria: EC § 47605.6(b)(6)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| Declaration of whether or not the charter school 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 |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **Required Affirmations** |
| [Evaluation Criteria: EC § 47605.6(e)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47605&lawCode=EDC) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Affirmation that the school will be nonsectarian in its programs, admission policies, employment practices, and all other operations |  |  |  |
| 2. Affirmation that the school shall not charge tuition |  |  |  |
| 3. Affirmation that the school shall not discriminate against any pupil on the basis of ethnicity, national origin, gender, gender identity, gender expression, disability, 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 California Penal Code |  |  |  |
| 4. Affirmation that the admission to a charter school shall not be determined according to the place of residence of the pupil, or of the pupil’s parent or legal guardian, within this state. |  |  |  |
| 5. [Affirmation that the charter school shall admit all pupils who wish to attend the charter school](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201920200AB1505) |  |  |  |
| 6. Affirmation that the school will comply with federal, state and local laws as required for charter schools |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **For Alternative Education Charter Schools, If Applicable** |
| [Evaluation Criteria: EC § 58500 - 58512](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=EDC&division=4.&title=2.&part=31.&chapter=3.&article) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Acknowledgement that the charter school will maintain an unduplicated count of at least 70% of the school's total enrollment composed of the required high-risk student groups |  |  |  |
| 2. Assurance that the school will maintain documentation that 70% of students will be reflected on Part 1 of their DASS Participation Form |  |  |  |
| 3. Clearly articulated mission and purpose to recruit and educate high-risk students |  |  |  |
| 4. Performance plan that include specific measures and goals for success, including one or two attainable norm references and/or verifiable alternative measures that support the school’s mission and vision |  |  |  |
| 5. An assurance that the school will maintain documentation that 70% of students will bereflected on Part 1 of their DASS Participation Form, as defined in item 1, above |  |  |  |
| 6. An assurance that when applying for other alternative school status, ONLY the school's current enrollment will be used (in accordance with the DASS Eligibility Criteria and examples) to determine a school's percentage of high-risk student for DASS eligibility |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |

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| **Any Other Justification for Denial** |
| [Evaluation Criteria: EC § 47605.6(b)(7)](http://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=EDC&division=4.&title=2.&part=28.&chapter=5.&article=5.5) | **Evaluation Standard Met** | **Located on Page(s)** |
| ***THE PETITION DESCRIBES, AT MINIMUM*** | **YES** | **NO** |
| 1. Any other basis that the county board of education finds justifies the denial of the petition.  |  |  |  |
| **COMMENTS BY REVIEW TEAM:** |  |  |  |