

[district/COE]
CHARTER SCHOOL PETITION REVIEW CHECKLIST

- Initial Petition
 Renewal Petition

Proposed Charter School: _____

Proposed Location: _____

Petitioner Contact Information	Petition Review and Presentation Timelines (Office Use Only)		
Name	Petition Submitted Date _____	Public Hearing (30 days from submission) Date Due _____	Decision by Board of Education (60 days from submission may be extended 30 days if mutually agreed) Date Due _____
Phone			
Address		Date Held _____	Date of Board Decision _____
Email			<input type="checkbox"/> extension requested?

Section below is for Office Use ONLY

Area of Review (EC 47605)	Department(s) Responsible	Name of Reviewer
A. Education Program		
B. Measurable Student Outcomes		
C. Student Progress Measurement		
D. Government Structure		
E. Employee Qualifications		
F. Health and Safety		
G. Racial & Ethnic Balance		
H. Admissions Requirements		
I. Annual Financial Audits		
J. Suspension and Expulsion		
K. Staff Retirement System		
L. Attendance Alternatives		
M. Description of Employee Rights		
N. Dispute Resolution Process		
O. Closure Procedures		
Supplemental Information		
Financial Plan		
Impact Statement		
Facilities		
Special Education		
Independent Study (if applicable)		

Instructions to Review Committee: This checklist is designed to guide the review of charter school petitions. Throughout the evaluation, you are asked to rate the petitioner’s response as Exceeds, Meets, or Fails to Meet the criteria required for each specific area. The following rating definitions should be used to guide your assessment.

- Exceeds Required Standard:* The response reflects a thorough understanding of key issues and indicates capacity to open and operate a quality charter school. The section addresses the topic with concise, specific and accurate information that shows thorough preparation, presenting a clear, realistic picture of how the school expects to implement and operate its program.
- Meets Required Standard:* The response indicates solid preparation and grasp of key issues that would be considered reasonably comprehensive. Overall it contains many of the characteristics of a response that exceeds the required standard, although it may require additional specificity, support or elaboration in places.
- Fails To Meet Required Standard:* The response addresses some of the selection criteria, but lacks meaningful detail and requires important additional information in order to be reasonably comprehensive. It demonstrates lack of preparation, is unclear, or otherwise raises substantial concerns about the petitioner’s understanding of the issue in concept and/or ability to implement or meet the requirement in practice.

At the end of each section, please elaborate, in the comment section, in the areas you rated as Fails to Meet, or Exceeds. Your comments are essential to understanding your assessment and will be used as part of the final analysis and report to the County Board.

Required Elements for Petition Review - Education Code 47605

A. Educational Program

<i>The education program should tell you who the school plans to serve, what the students will achieve, how they will achieve it, and how the school will evaluate performance. The petition should provide a clear picture of what a student who attends the school will experience in terms of educational climate, structure, materials, schedule, assessment and outcomes.</i>	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> 1. Targeted School Populations				
◆ Grade levels, number of students, specific educational interests, backgrounds, or challenges				
◆ Specifies a clear, concise school mission and vision statement that align with the needs of the target population				
<input type="checkbox"/> Coherent description of students whom the charter will attempt to educate				
<input type="checkbox"/> 2. Attendance				
◆ School year, academic calendar, number of school days and instructional minutes				
◆ Attendance expectations and requirements				
<input type="checkbox"/> 3. What it Means to be an Educated Person in the 21st Century				
<input type="checkbox"/> Goals consistent with enabling pupils to become or remain self-motivated, competent, lifelong learners				
◆ Clear list of general academic skills and qualities important for an educated person				
◆ Clear list of general non-academic skills and qualities important for an educated person				

Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
- While not necessarily recommended, these considerations are important to include

A. Educational Program (continued)				
	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> 4. Description of How Learning Best Occurs				
◆ Includes a framework for instructional design that is aligned with the needs of the students that the charter has identified as its target student population, which is based upon successful practice or research				
◆ Description of learning setting (e.g. site-based matriculation, independent study, technology-based education)				
◆ Description of instructional approaches and strategies school will utilize, including, but not limited to the curriculum and teaching methods (or a process for developing the curriculum and teaching methods) that will enable the school's students to master the content standards for the core curriculum areas adopted by the SBE pursuant to EC Section 60605				
◆ Outlines a plan or strategy to support students not achieving at or above expected levels				
◆ Describes a plan how the school will meet the needs of English language learners by helping them gain English proficiency and also make progress in all academic subjects				
◆ Indicates how the charter school will identify and meet the needs of Students with Disabilities, and how the special education plan aligns with the core educational program				
5. Annual Goals				
◆ Annual goals are included for all pupils and for each subgroup of pupils identified pursuant to Section 52052, consistent with characteristics of the students the school intends to serve.				
◆ Goals address identified eight (8) state priorities (listed in Ed Code 52060(d) – LCAP) that apply for the grade levels served or the nature of the program.				
◆ Includes specific annual actions to achieve the stated goals; actions are designed to achieve the goals.				
○ Additional school priorities related to unique aspects of the proposed charter program, with goals and specific annual actions.				
6. Additional Requirements for Charter Schools Serving High School Students				
<input type="checkbox"/> Does the Charter School describe how it will inform parents about the transferability of courses to other public high schools				
<input type="checkbox"/> Does the Charter School describe how it will inform parents about the eligibility of courses to meet college entrance requirements				
Educational Program - Comments				
If Exceeds Required Standard, include Strengths:	If Fails to Meet Standard, include Concerns and/or Additional Questions:			

Legend:

- Topic required to be included in charter petition
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Charter Petition Name: _____

Complete Petition Received:

B. Measurable Student Outcomes

The outcomes evaluated in this section should represent the school's definitions of success, which are central to the school's existence. These outcomes should drive all aspects of the operation of its educational program and should be in alignment with the petition's mission and vision.

Exceeds Required Standard	Meets Required Standard	Fails To Meet Req.	Found on Page:
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<input type="checkbox"/>	Pupil outcomes are clear, specific, and measurable, i.e. specific assessments listed for each exit outcome			
<input type="checkbox"/>	Pupil outcomes align with the state priorities, as described in Ed Code 52060(d) (consistent with LCAP), that apply for the grade levels served or the nature of the program.			
◆	How pupil outcomes will address state content and performance standards in core academics			
◆	Clearly stated exit outcomes include acquisition of academic and non-academic skills			
◆	Includes the school's performance on state standardized tests.			
◆	Description or affirmation that "benchmark" skills and specific classroom-level skills will be developed			
◆	Are described measurable outcomes capable of being used readily to evaluate the effectiveness, and to modify instruction for, individual students and groups of students			
◆	Description or affirmation of how the exit outcomes will align to mission, curriculum and assessments			
◆	Affirmation that college-bound students wishing to attend California colleges or universities will have the opportunity to take courses that meet the "A-G" requirements			
◆	Lists school-wide student performance goals students will achieve over a given period of time: Projected attendance levels, dropout percentage, graduation rate goals, etc.			
◆	Acknowledges that exit outcomes and performance goals may need to be modified over time			
◆	If high school, graduation requirements defined and WASC accreditation addressed			

Measurable Student Outcomes - Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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Charter Petition Name: _____

Complete Petition Received: _____

C. Student Progress Measurement

<i>This section evaluates the petitioner's plan for assessing and measuring student's progress, (i.e. does it use both formative and summative evaluations for student performance) and how it will use the assessments to inform instruction.</i>	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
◆ At least one assessment method or tool listed for each of the exit outcomes				
◆ Assessments include multiple, valid and reliable measures using traditional/alternative tools to include assessment for students with learning difficulties				
□ Assessment tools include all required state and federal assessments (SBAC, CELDT, etc.) for purposes of				
◆ Chosen assessments are appropriate for standards and skills they seek to measure				
◆ Affirmation/description of how assessments align to mission, exit outcomes, and curriculum				
◆ Describes minimal required performance level necessary to attain each standard				
◆ Outlines a plan for collecting, analyzing/utilizing and reporting student/school performance to school staff and to students' parents and guardians, and for utilizing the data continuously to monitor and improve				

Student Progress Measurement - Comments

If Exceeds Required Standard, include Strengths: Is to Meet Standard, Include Concerns and/or Additional Questions:

If Fai

Legend:

- *Topic required to be included in charter petition*
- ◆ *Strongly suggested to ensure that charter elements are reasonably comprehensive*
- *While not necessarily recommended, these considerations are important to include*

Charter Petition Name: _____

Complete Petition Received: _____

D. Governance Structure

This section should provide a clear, convincing picture of the petitioner's capacity to operate the school successfully. Experience with new school development

	Exceeds Required Standard Exceeds	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> Includes evidence of the charter school's incorporation as a non-profit public benefit corporation, if applicable, or in the least, a clear description of the legal status of the charter school				
<input type="checkbox"/> Includes evidence that the organizational technical designs of the governance structure <ul style="list-style-type: none"> ▪ A seriousness of purpose necessary to ensure that the charter school will become and remain a viable enterprise, and Demonstrates understanding and assurance of compliance with ▪ That there will be active and effective representation of interested parties, including, but not limited to, a meaningful plan for involvement or input of parents/guardians in the governance of the 				
<input type="checkbox"/> Describes key features of governing structure and clearly delineates the roles and responsibilities of the governing body and staff, including, but not <ul style="list-style-type: none"> ▪ Demonstrates understanding and assurance of compliance with open meeting requirements ▪ Reasonable conflict of interest policy; ▪ Size/composition of board, board committees and/or advisory councils ▪ Board's scope of authority/responsibility ▪ Method for selecting initial board members and election/appointment for Board replacements ▪ Adequate plan for insurance 				
◆ Clear, sensible delineation of roles and responsibilities of parent councils, advisory committees or other supporting groups				
◆ Affirms future development of, or has set of proposed bylaws, policies or similar documents				
◆ Outlines other important legal or operational relationships between school and granting agency				

Governance Structure - Comments

If Exceeds Required Standard, include Strengths: If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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Complete Petition Received:

E. Employee Qualifications					
<i>This section evaluates how effective the school's leadership and management structure is likely to be based on the plan for hiring, staffing qualified teachers, and development of procedures and controls regarding the administration of the school.</i>		Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
◆	Identifies 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				
□	Defines core, college preparatory teachers & affirms they will hold appropriate Commission on Teacher Credentialing certificate, permit or other equivalent				
◆	Identifies 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 school's faculty, staff, and students.				
◆	A clear plan for recruitment, selection, development and evaluation of staff including the school leader				
◆	An approved and public organizational charter delineating board and management roles and lines of authority				
○	Identifies qualification of non-core, non-college prep teaching positions staffed by non-certified teachers				

Employee Qualifications - Comments	
If Exceeds Required Standard, include Strengths:	If Fails to Meet Standard, include Concerns and/or Additional Questions:

F. Health and Safety					
		Exceeds Required Standard	Meets Required Standard	Fails To Meet Req.	Found on Page:
□	Affirms that each employee will furnish the school with a criminal background clearance report, and proof of tuberculosis examination				
◆	Outlines specific health and safety practices addressing such key areas as:				
	▪ Mandated Child Abuse Reporting				
	▪ Natural disasters and emergencies, including seismic safety (structural integrity and earthquake preparedness)				

Legend:

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Charter Petition Name:

Complete Petition Received:

<ul style="list-style-type: none"> ▪ Required Immunizations; vision, hearing & scoliosis health screenings; and administration of medications to the same extent as would apply if the students attended a non-charter public school 								
<ul style="list-style-type: none"> ▪ Staff training on emergency and first aid response 								
<ul style="list-style-type: none"> ○ References accompanied by a detailed set of health and safety related policies/ procedures or the date by which they will be adopted and submitted to the [DISTRICT/COE] 								

Health and Safety - Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

- *Topic required to be included in charter petition*
- ◆ *Strongly suggested to ensure that charter elements are reasonably comprehensive*
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G. Racial and Ethnic Balance

This section evaluates the ways in which the charter school will address efforts to achieve a racial and ethnic balance that is reflective of the general population within the district in which it proposed to be located achieve a racial and ethnic balance that is reflective of the general population within the district in which it proposed to be located

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> Lists specific practices/policies the school will design and implement to attract a diverse applicant pool/ enrollment that is reflective of the general population residing within the territorial jurisdiction of the district				
<input checked="" type="checkbox"/> Practices and policies appear likely to achieve racial and ethnic balance				

Racial and Ethnic Balance - Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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H. Admissions Requirements

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> Mandatory assurances regarding non-discriminatory admission procedures, including a statement that no student “otherwise eligible” to enroll in the charter school will be denied enrollment due to a disability or the charter school’s inability to provide necessary services				
<input checked="" type="checkbox"/> Clearly describes proposed admissions and enrollment requirements, process and timeline, as well as implementation of the public random lottery process, if necessary				

Legend:

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Charter Petition Name:

Complete Petition Received:

Admission Requirements – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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I. Annual Financial Audits

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> The manner in which the audit will be conducted, including who is responsible for contracting and overseeing the independent audit				
◆ Procedure to select and retain independent auditor				
◆ Qualifications of independent auditor				
<input type="checkbox"/> Audit will employ generally accepted accounting procedures				
Scope and timing of audit, as well as required distribution of completed audit				
<input type="checkbox"/> Includes a process that the charter school will follow to address any audit findings and or resolve audit exceptions				
◆ Process includes that it will satisfy any audit deficiencies to the satisfaction of the [district/COE]				

Annual Financial Audits - Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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J. Suspension and Expulsion					
		Exceeds Required Standard	Meets Required Standard	Fails To Meet Req.	Found on Page:
<input type="checkbox"/>	Describes Process and procedures by which students may be suspended or expelled				
◆	Reference to a set of student disciplinary policies that provides evidence that the charter petitioners believe their proposed lists of offenses and procedures provide adequate safety for students, staff and visitors to the school and serve the best interests of the school's students and their parents				
<input type="checkbox"/>	Outlines or describes strong understanding of relevant laws protecting constitutional rights of students				
◆	Provides for due process for all students and demonstrates understanding of the rights of students with disabilities in regard to suspension and expulsion				
◆	Explains how [DISTRICT/COE] may be involved in disciplinary matters				

Suspension and Expulsion - Comments	
If Exceeds Required Standard, include Strengths:	If Fails to Meet Standard, include Concerns and/or Additional Questions:

K. Staff Retirement System					
		Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/>	Statement of whether staff will participate in STRS, PERS, and/or Social Security (if STRS, then all teachers must participate)				
○	Staff who will be responsible for ensuring that the appropriate arrangements for that coverage have been made.				

Staff Retirement System - Comments	
If Exceeds Required Standard, include Strengths:	If Fails to Meet Standard, include Concerns and/or Additional Questions:

Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
- While not necessarily recommended, these considerations are important to include

Charter Petition Name: _____

Complete Petition Received:

L. Attendance Alternatives				
	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/>				
Describe attendance alternatives for students residing within the county who choose not to attend charter schools				
Attendance Alternatives – Comments				
If Exceeds Required Standard, include Strengths:		If Fails to Meet Standard, include Concerns and/or Additional Questions:		

Internal Work Papers

Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
- While not necessarily recommended, these considerations are important to include

Charter Petition Name: _____

Complete Petition Received: _____

M. Description of Employee Rights					
		Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/>	States that collective bargaining contracts of [DISTRICT/COE] will be controlling				
◆	Whether and how staff may resume employment within the district or [DISTRICT/COE], if applicable				
◆	Sick/vacation leave (ability to carry it over to and from charter school, if applicable)				
◆	Whether staff will continue to earn service credit (tenure) in district or [DISTRICT/COE] while at charter school, if applicable				
Description of Employee Rights – Comments					
If Exceeds Required Standard, include Strengths:			If Fails to Meet Standard, include Concerns and/or Additional Questions:		

N. Dispute Resolution Process					
		Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/>	Outlines a simple process for the charter school and the [district/COE] to settle disputes relating to the provisions of the charter				
◆	Outlines process by which charter school will resolve internal complaints and disputes				
◆	Petition acknowledges that except those disputes between the LEA and the School, all disputes involving the school shall be resolved by the school according to the school's own internal policies.				

Legend:

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- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
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Charter Petition Name:

Complete Petition Received:

Dispute Resolution Process – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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O. Closure Procedures

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> Outlines a description of the process to be used if the charter school closes				
<input type="checkbox"/> Process includes a final audit of the charter school, specific plans for disposition of all net assets and liabilities, as well as for the maintenance and transfer of pupil records				

Closure Procedures – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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Charter Petition Name: _____

Complete Petition Received: _____

FINANCIAL PLAN

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> Proposed first year operational budget				
▪ <i>Start-up costs</i>				
▪ <i>Cash flow for first three years</i>				
▪ <i>Financial projections for first three years</i>				

Proposed First Year Operational Budget – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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◆ Planning Assumptions

▪ Number/types of students	
▪ Number of staff	
▪ Facilities needs	
▪ Costs of all major items are identified and within reasonable market ranges	
▪ Revenue assumptions in line with state and federal funding guidelines	
▪ Revenue from “soft” sources less than 10% of ongoing operational costs	
▪ Timeline allows window for referenced grant applications to be submitted and funded	

Planning Assumptions – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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- ◆ *Strongly suggested to ensure that charter elements are reasonably comprehensive*
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	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
◆ Start-Up Costs				
<ul style="list-style-type: none"> ▪ Clearly identifies all major start-up costs <ul style="list-style-type: none"> <input type="checkbox"/> Staffing <input type="checkbox"/> Facilities <input type="checkbox"/> Equipment and Supplies <input type="checkbox"/> Professional Services ▪ Assumptions in line with overall school design plan ▪ Identifies potential funding source ▪ Timeline allows for grant and fundraising 				
Start-Up Costs – Comments				
If Exceeds Required Standard, include Strengths:		If Fails to Meet Standard, include Concerns and/or Additional Questions:		
❑ Annual Operating Budget				
<ul style="list-style-type: none"> ▪ Annual revenues and expenditures clearly identified by source ▪ Revenue assumptions closely related to applicable state and federal funding formulas ▪ Expenditure assumptions reflect school design plan ▪ Expenditure assumptions reflect market costs ▪ “Soft” revenues not critical to solvency ▪ Strong reserve or projected ending balance (the larger of 3% of expenditures or \$25,000) ▪ If first year is not in balance, identifies solvency in future years and sources of capital sufficient to cover deficits until the school year when the budget is projected to balance ▪ Expenditure for sufficient insurance to name district/[DISTRICT/COE] as also insured/hold harmless agreement ▪ Expenditure sufficient for reasonably expected legal services ▪ Expenditure for Special Education excess costs consistent with current experience in the school district/county ▪ Expenditure for facilities – if specific facilities not secured, reasonable projected cost 				

Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
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Charter Petition Name:

Complete Petition Received:

Annual Operating Budget – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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Charter Petition Name:

Complete Petition Received:

		Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
◆ Cash Flow Analysis					
<ul style="list-style-type: none"> ▪ Monthly projection of revenue receipts in line with local/state/federal funding disbursements 					
<ul style="list-style-type: none"> ▪ Expenditures projected by month and correspond with typical/reasonable schedules 					
<ul style="list-style-type: none"> ▪ Show positive cash balance each month and/or identify sources of working capital 					
Cash Flow Analysis – Comments					
If Exceeds Required Standard, include Strengths:			If Fails to Meet Standard, include Concerns and/or Additional Questions:		
◆ Long-Term Plan					
<ul style="list-style-type: none"> ▪ Projects revenues and expenditures for at least two additional years 					
<ul style="list-style-type: none"> ▪ Revenue assumptions based on reasonable potential growth in local, state and federal revenues 					
<ul style="list-style-type: none"> ▪ Revenue assumptions based on reasonable student growth projections 					
<ul style="list-style-type: none"> ▪ Reasonable cost-of-living and inflation/funding reduction assumptions 					
<ul style="list-style-type: none"> ▪ Annual fund balances are positive or sources of supplemental working capital are identified 					
Long-Term Plan – Comments					
If Exceeds Required Standard, include Strengths:			If Fails to Meet Standard, include Concerns and/or Additional Questions:		

Legend:

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Charter Petition Name: _____

Complete Petition Received:

IMPACT STATEMENT

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
◆ Provides estimated numbers of students anticipated to enroll				
◆ Identifies whether charter will request to purchase support services from [DISTRICT/COE] or district assumptions				
◆ Describes suggested processes and policies between charter and [DISTRICT/COE] including:				
▪ Process, activities and associated fees for oversight of charter				
▪ Content, processes, timelines, and evaluation criteria for annual review and site visits				
▪ Regular, ongoing fiscal and programmatic performance monitoring and reporting				
▪ Content, process, timelines and evaluation criteria for charter renewal				
○ Proposed support service needs and suggested payments to [DISTRICT/COE] or district for services				
▪ Clearly drafted contract/agreement or reference to MOU				
○ Identify whether a request will be made for use of [DISTRICT/COE] or district-owned facilities				
○ Reasonably detailed lease or occupation agreement for privately obtained facilities				
◆ Proposed legal status of school is identified				
<input type="checkbox"/> Describes the manner in which administrative services of the charter school are to be provided				
◆ Identify whether school intends to manage risk independently or will seek to secure coverage through the [district/COE] or other public agency				
<input type="checkbox"/> Addresses potential civil liability effects, if any, upon the school and the [DISTRICT/COE]				

Impact Statement – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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Charter Petition Name:

Complete Petition Received:

D. Location of Facility (place within petition may vary)				
<i>This section should demonstrate the petitioners understanding of the school's facilities needs and its options for meeting those needs.</i>	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> Includes the location of each charter school facility which the petitioner proposes to operate, including size and resources				
◆ Provides informed assessment and analysis of anticipated facilities needs and viability of potential sites				
<input type="checkbox"/> Describes the current and projected availability of each charter school site. (i.e., provides a schedule for securing the facility including the person responsible for implementation.)				
Describes each charter school facility which the petitioner proposes to operate in terms of safety and educational suitability.				
◆ An assurance of legal compliance (health and safety, ADA, and applicable building codes)				
◆ Adequate budget for anticipated facilities costs including renovation, rent, maintenance and utilities				

Location of Facility - Comments

If Exceeds Required Standard, include Strengths If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

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Charter Petition Name: _____

Complete Petition Received: _____

SPECIAL EDUCATION

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> Identifies whether the charter will be an independent LEA for special education purposes				
<input type="checkbox"/> The petition provides that the charter school will assume full responsibility for appropriate accommodation to address the needs of any student.				
<input type="checkbox"/> The petition acknowledges the responsibility of the charter school to provide special education, instruction and related services to the students enrolled in the school regardless of students' district of residence				
<input type="checkbox"/> Petition/MOU describes the process for notifying district of residence and authorizing school district when a special education student enrolls, becomes eligible, ineligible and/or leaves charter school				
<input type="checkbox"/> Has consulted with a SELPA Director for:				
• Discussed special education responsibilities of charter				
• Discussed application of SELPA policies				
<input type="checkbox"/> Describes how special education services will be provided consistent with SELPA Plan and/or policies and procedures				
▪ Includes fiscal allocation plan				
<input type="checkbox"/> If charter not an independent LEA:				
▪ Clarifies in charter or an MOU the responsibilities of each party for service delivery				
<input type="checkbox"/> Referral				
<input type="checkbox"/> Assessment				
<input type="checkbox"/> Instruction				
<input type="checkbox"/> Due Process				
<input type="checkbox"/> Agreements describing allocation of actual and excess costs				
<input type="checkbox"/> Charter fiscally responsible for fair share of any encroachment on general funds				
<input type="checkbox"/> If charter is LEA within a SELPA				
▪ Notifies SELPA Director of intent prior to February 1 st of the preceding school year				
▪ Located within SELPA's geographical boundaries				
▪ Provides current operating budget in accordance with Ed Code 42130 and 42131				
▪ Provides assurances that all be instructed in safe environment				
▪ Provides copy of original charter petition and any amendments				
▪ Responsible for any legal fees relating to application and assurances process				

Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
- While not necessarily recommended, these considerations are important to include

Charter Petition Name:

Complete Petition Received:

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<ul style="list-style-type: none"> ▪ Meets the terms of the “Agreement Regarding the Organization, Implementation, Administration and Operation of the (name of) SELPA” 				
<ul style="list-style-type: none"> ▪ Meets the terms of all (name of) SELPA policies and procedures 				
<ul style="list-style-type: none"> ▪ Charter fiscally responsible for fair share of any encroachment on general funds 				
<input type="checkbox"/> Petition includes the following assurances:				
<ul style="list-style-type: none"> ▪ The charter will comply with all provisions of IDEA 				
<ul style="list-style-type: none"> ▪ No student will be denied admission based on disability or lack of available services 				
<ul style="list-style-type: none"> ▪ Will implement a Student Study Team process 				
<ul style="list-style-type: none"> ▪ Any student potentially in need of Section 504 services will be the responsibility of the charter school 				
◆ Overview of how special education funding and services will be provided by:				
<ul style="list-style-type: none"> ▪ Charter School 				
<ul style="list-style-type: none"> ▪ [district/COE] 				
<ul style="list-style-type: none"> ▪ SELPA 				
<input type="checkbox"/> Petition/MOU describes the transition to or from a district when a student with an IEP enrolls in, or transfers out of, the charter school				

Special Education Funding and Services – Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
- While not necessarily recommended, these considerations are important to include

Ed Code 47612.5, 51745 and 51747 | Independent Study (If Applicable)

Evaluation Criteria	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
<input type="checkbox"/> The petition verifies that the K-12 public school guidelines for independent study will be evident in the annual audit. 47612.5(b) Notwithstanding any other provision of law and except to the extent inconsistent with this section and Section 47634.2, a charter school that provides independent study shall comply with Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 and implementing regulations adopted there-under.				
<input type="checkbox"/> The petition states that it will meet the requirement related to the ratio of ADA to FTE certificated employees as prescribed under education code. 51745.6(a) The ratio of average daily attendance for independent study pupils 18 years of age or less to school district full-time equivalent certificated employees responsible for independent study, calculated as specified by the State Department of Education, shall not exceed the equivalent ratio of pupils to full-time certificated employees for all other education programs operated by the school district. The ratio of average daily attendance for independent study pupils 18 years of age or less to county office of education fulltime equivalent employees responsible for independent study, to be calculated in a manner prescribed by the State Department of Education, shall not exceed the equivalent ratio of pupils to full-time certificated employees for all other educational programs operated by the high school or unified school district with the largest daily attendance of pupils in that county. The computation of those ratios.				

The petition includes Written Policies required for eligibility to receive apportionments for Independent Study per

<input type="checkbox"/> The maximum length of time, by grade level and type of program that may elapse between the time an independent study assignment is made and the date by which the pupil must complete the assigned work.				
<input type="checkbox"/> The number of missed assignments that will be allowed before an evaluation is conducted to determine whether it is in the best interests of the pupil to remain in independent study, or whether he or she should return to the regular school program.				
<input type="checkbox"/> The requirement that a current written agreement for each pupil will be maintained in file, at a minimum, the following areas:				
<input type="checkbox"/> The manner, time, frequency, and place for submitting a pupil's assignments and for reporting his or her progress.				
<input type="checkbox"/> The objectives and methods of study for the pupil's work, and the methods utilized to evaluate that work.				
<input type="checkbox"/> The specific resources, including materials and personnel that will be made available to the pupil.				

Annual Performance – Comments

If Exceeds Required Standard, include Strengths:	If Fails to Meet Standard, include Concerns and/or Additional Questions:

Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
- While not necessarily recommended, these considerations are important to include

Required Supplemental Information

Ed Code 47612.5, 51745 and 51747 Independent Study (if applicable)				
Evaluation Criteria	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on page:
<input type="checkbox"/> A statement of the policies adopted pursuant to subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, and the number of missed assignments allowed prior to an evaluation of whether or not the pupil should be allowed to continue in independent study.				
<input type="checkbox"/> The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one semester, or one-half year for a school on a year-round calendar.				
<input type="checkbox"/> A statement of the number of course credits, or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.				
<input type="checkbox"/> The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate.				
<input type="checkbox"/> Each written agreement shall be signed, prior to the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil.				
<input type="checkbox"/> Petition acknowledges that independent study will be supervised by an appropriately credentialed teacher per 51747.5(a)				
<input type="checkbox"/> Petition acknowledges that school may claim apportionment credit for independent study only to the extent of the time value of pupil or student work products, as personally judged in each instance by a certified teacher per 51747.5(b).				

Independent Study – Comments

If Exceeds Required Standard, include Strengths:	If Fails to Meet Standard, include Concerns and/or Additional Questions:

Legend:

- Topic required to be included in charter petition
- ◆ Strongly suggested to ensure that charter elements are reasonably comprehensive
- While not necessarily recommended, these considerations are important to include

Charter Petition Name:

Complete Petition Received:

Likelihood that the Petitioners Will be Able to Successfully Implement the Program of the Proposed Charter

	Exceeds Required Standard	Meets Required Standard	Fails To Meet Req. Standard	Found on Page:
◆ If the petitioners have a past history of involvement in charter schools or other education agencies (public or private), the history is one that the Board of Education regards as successful, (e.g., the petitioners have been associated with a charter school of which the charter has been renewed)				
◆ The Petition as a whole shows evidence that the Petitioner understands and is familiar with the requirements of law				
◆ The Petition includes a thorough description of the education, work experience, credentials, degrees and certifications of the individuals comprising, or proposed to comprise, the directors, administrators and managers of the proposed charter school (including the areas of curriculum development, instruction, finance, business management and administrative services)				
◆ The Petitioners have a plan to secure the services of necessary key players critical to the charter school's success				

Comments

If Exceeds Required Standard, include Strengths:

If Fails to Meet Standard, include Concerns and/or Additional Questions:

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Legend:

- Topic required to be included in charter petition*
- ◆ *Strongly suggested to ensure that charter elements are reasonably comprehensive*
- *While not necessarily recommended, these considerations are important to include*