



# CHARTER SCHOOL PETITION EVALUATION MATRIX

School Name: [Click or tap here to enter text.](#)

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## California Education Code 47605(c)

In reviewing petitions for the establishment of charter schools pursuant to this section, the chartering authority shall be guided by the intent of the California State Legislature that charter schools are and should become an integral part of the educational system and that the establishment of charter schools should be encouraged. The governing board of the school district shall grant a charter for the operation of a school under this part if it is satisfied that granting the charter is consistent with sound educational practice and with the interests of the community in which the school is proposing to locate. The governing board of the school district shall consider the academic needs of the pupils the school proposes to serve. The governing board of the school district shall not deny a petition for the establishment of a charter school unless it makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the following findings:

- 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 Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code.
- 7) The charter school is demonstrably unlikely to serve the interests of the entire community in which the school is proposing to locate. Analysis of this finding shall include consideration of the fiscal impact of the proposed charter school. A written factual finding under this paragraph shall detail specific facts and circumstances that analyze and consider the following factors:
  - a) The extent to which the proposed charter school would substantially undermine existing services, academic offerings, or programmatic offerings.
  - b) Whether the proposed charter school would duplicate a program currently offered within the school district and the existing program has sufficient capacity for the pupils proposed to be served within reasonable proximity to where the charter school intends to locate.
- 8) The school district is not positioned to absorb the fiscal impact of the proposed charter school. A school district satisfies this paragraph if it has a qualified interim certification pursuant to Section 1240 and the county superintendent of schools, in consultation with the County Office Fiscal Crisis and Management Assistance Team, certifies that approving the charter school would result in the school district having a negative interim certification pursuant to Section 1240, has a negative interim certification pursuant to Section 1240, or is under state receivership. Charter schools proposed in a school district satisfying one of these conditions shall be subject to a rebuttable presumption of denial.

## 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.

<b>A. Description of Vision, Mission and Educational Program</b>			
Evaluation Criteria: EC § 47605(c)(5)(A) <i>THE PETITION DESCRIBES, AT MINIMUM</i>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
<b>1. Targeted Student Populations and Community Need</b>			
a. <i>Students the charter school will attempt to educate and a demonstration of need for proposed educational program</i>			
b. <i>Grade levels and number of students the charter school plans to serve</i>			
c. <i>A clear, concise school mission and vision statement that aligns with the target population</i>			
d. <i>The needs and challenges of the student groups to be served</i>			
<b>2. Attendance</b>			
a. <i>School year/academic calendar, number of school days and instructional minutes</i>			
b. <i>Master/daily schedule and proposed bell schedule</i>			
<b>3. What It Means to Be an Educated Person in the 21st Century</b>			
a. <i>Goals that are consistent with enabling all pupils to become or remain self-motivated, competent, lifelong learners</i>			
b. <i>List of academic skills and qualities important for an educated person</i>			
c. <i>List of general non-academic skills and qualities important for an educated person</i>			
<b>4. How Learning Best Occurs/Instructional Design, Including Subgroup Program</b>		<b>CCR § 11967.5.1. (f)(C)</b>	
a. <i>A framework for instructional design that is aligned with the needs of the students that the charter has identified as its target student population</i>			
b. <i>Description of learning setting (e.g. site-based matriculation, independent study, tech-based)</i>			
c. <i>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</i> - <i>The description demonstrates understanding of the likely ELL population</i> - <i>Includes sound approach to identify and meet the needs of subgroup populations</i>			
d. <i>Special education plan including, but not limited to, the means by which the charter school will comply with the provisions of EC section 47641</i>			
e. <i>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</i>			
f. <i>Process for developing or adopting curriculum and teaching methods</i>			
g. <i>A plan for professional development that aligns with the charter school's proposed program</i>			

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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			
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 - Additional priorities related to unique aspects of the proposed charter school program include goals and specific annual actions			
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			
<b>COMMENTS BY REVIEW TEAM:</b>			

B. Measurable Student Outcomes			
Evaluation Criteria: EC § 47605(c)(5)(B) <i>THE PETITION DESCRIBES, AT MINIMUM</i>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. Measurable pupil outcomes for all groups, i.e. specific assessment methods or tools listed for each exit outcome			
2. A description of how pupil outcomes align with the state priorities consistent with LCAP, as described in EC 52060(d), that apply for the grade levels served or the nature of the program			
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			
<b>COMMENTS BY REVIEW TEAM:</b>			

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

<b>D. Governance Structure</b>			
Evaluation Criteria: EC § 47605(c)(5)(D) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. <b>Evidence of the charter school's incorporation as a nonprofit benefit corporation</b>			
a. <b>Provides the names and relevant qualifications of all persons whom the petitioner nominates to serve on the governing body of the charter school</b>			
b. <b>Includes a set of bylaws and basic policies</b>			
2. <b>Evidence that the organizational technical designs of the governance structure reflect:</b> - <b>A seriousness of purpose to ensure that the charter will become and remain a viable enterprise</b> - <b>Understanding and assurance of compliance with open meeting requirements</b>			
3. <b>Key features of the governing structure:</b>			
a. <b>Delineation of roles and responsibilities of the governing board and staff</b>			
b. <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</b>			
c. <b>Size/composition of board, board committees and/or advisory councils</b>			
d. <b>Method for selecting initial board members and election/appointment for board member replacement</b>			
4. <b>A process for involvement or input of parents/guardians in the governance of the charter school:</b>			
a. <b>A clear delineation of roles and responsibilities of parent councils, advisory committee or other supporting groups</b>			
b. <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 continuation at the charter school</b>			
5. <b>Specific policies and internal controls that will prevent fraud, embezzlement, and conflict of interest and ensures the implementation and monitoring of those policies</b>			
6. <b>A description and frequency of board trainings/workshops</b>			
7. <b>Other important legal or operational relationships between the charter school and granting agency</b>			
<b>COMMENTS BY REVIEW TEAM:</b>			

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<b>E. Employee Qualifications</b>			
Evaluation Criteria: EC § 47605(c)(5)(E) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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. By July 1, 2020, all teachers in charter school shall obtain a certificate of clearance and satisfy the requirements for professional fitness pursuant to Education Code sections 44339, 44340 and 44341			
3. 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			
4. 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			
5. A clear plan for recruitment, selection, development and evaluation of staff and charter school leader			
6. Roles and lines of authority for board and management positions			
7. Proposed teacher to student ratio			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>F. Health and Safety Procedures</b>			
Evaluation Criteria: § 47605(c)(5)(F) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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, and proof 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)			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>G. Racial and Ethnic Balance</b>			
Evaluation Criteria: EC § 47605(c)(5)(G) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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			

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territorial jurisdiction of the district			
2. The outreach strategies, identifying specifically who the targeted groups will be, including developed 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.)			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>H. Admissions Requirements, If Applicable</b>			
Evaluation Criteria: § 47605(c)(5)(H) <i>THE PETITION DESCRIBES, AT MINIMUM</i>	Evaluation Standard Met		Located on Page(s)
	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 charter school 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			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>I. Annual Independent Financial Audits</b>			
Evaluation Criteria: § 47605(c)(5)(m) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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			
6. 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			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>J. Suspension and Expulsion Procedures</b>			
Evaluation Criteria: EC § 47605(c)(5)(J) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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, and at 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			
<b>COMMENTS BY REVIEW TEAM:</b>			

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<b>K. California State Teacher Retirement System</b>			
Evaluation Criteria: EC § 47605(c)(5)(K) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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			
2. Whether retirement will be offered with language clearly reflecting one of the following choices for each retirement system <ul style="list-style-type: none"> <li>- Coverage will be offered to eligible employees</li> <li>- The charter school retains the option to elect the coverage at a future date</li> <li>- The charter school will not offer coverage</li> </ul>			
3. Individual responsible for ensuring that the appropriate arrangements for coverage have been made			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>L. Public School Attendance Alternatives</b>			
Evaluation Criteria: EC § 47605(c)(5)(L) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
Attendance alternatives for students residing within the county who choose not to attend the charter school			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>M. Post-employment Rights of Employees</b>			
Evaluation Criteria: EC § 47605(c)(5)(M) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. School district employee's return employment rights, including <ul style="list-style-type: none"> <li>a. Whether, and how staff may resume employment within the district or authorizer</li> <li>b. The ability to transfer sick/vacation leave to and from charter and another LEA</li> <li>c. Whether staff will continue to earn service credit (tenure) in district while employed at charter</li> </ul>			
2. Whether collective bargaining contracts of charter authorizer will be a controlling document			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>N. Dispute Resolution Procedures</b>			
Evaluation Criteria: EC § 47605(c)(5)(N) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
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 <ul style="list-style-type: none"> <li>a. Includes Uniform Complaint procedures and description of how this process is communicated to parents, staff, and the community</li> </ul>			

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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 for revocation of the charter, the authorizer shall not be obligated by the terms of the dispute resolution process as a precondition to revocation			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>O. Closure Procedures</b>			
Evaluation Criteria: EC § 47605(c)(5)(O) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. <b>The procedures to be used if the charter school closes</b> , 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. <b>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</b>			
3. <b>A process of how charter will ensure a final audit of the charter school</b>			
a. <b>An assurance it will be conducted within six months of closure</b>			
b. <b>The disposition of the charter school's assets</b>			
c. <b>Plans for disposing net assets</b>			
4. <b>The transfer and maintenance of personnel records in accordance with applicable law</b>			
<b>COMMENTS BY REVIEW TEAM:</b>			

## Required Supplemental Criteria

<b>Financial/Administrative Plan</b>			
Evaluation Criteria: EC § 47605(h) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. <b>A first year operational budget</b>			
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)			

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School Name: Click or tap here to enter text.

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			
<b>2. Start-up costs</b>			
a. Reasonable allocation for all major start-up costs including staffing, facilities, equipment and supplies, professional services (i.e. food services, etc.), technology materials, assessment systems/materials 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			
<b>3. Cash flow and financial projections for first 3 years</b>			
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			
<b>4. Financial projections include a clear description of planning assumptions</b>			
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			
<b>5. Manner in which administrative services and operations are provided</b>			
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			

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**COMMENTS BY REVIEW TEAM:**

**Charter Management Organization, i.e. Entities Managing Charter Schools**

Evaluation Criteria: EC § 47605(h)

**THE PETITION DESCRIBES, AT MINIMUM**

	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. <b>Name and relationship of CMO to charter school</b> , 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:**

**Facilities**

Evaluation Criteria: EC § 47605(h)

**THE PETITION DESCRIBES, AT MINIMUM**

	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. <b>The types and the location of the charter school facility that the petitioner proposes to operate</b>			
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:**

**Impact Statement**

Evaluation Criteria: EC § 47605(h)

**THE PETITION DESCRIBES, AT MINIMUM**

	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. <b>Potential civil liability effects, if any, upon the school and the authorizer</b>			
2. Number of students anticipated to enroll			

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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			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>Community Impact</b>			
Evaluation Criteria: EC § 47605(c)(7) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. How the charter school will not substantially undermine existing school district services, academic offerings, or programmatic offerings			
2. Whether the charter school petition duplicates a program currently offered by the district, and the existing program has sufficient capacity for the pupils proposed to be served within reasonable proximity to where the charter school intends to locate			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>Special Education</b>			
Evaluation Criteria: EC § 47641(a) and EC § 47646 <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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			

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School Name: [Click or tap here to enter text.](#)

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			
<b>If the charter will not be an independent LEA</b>			
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			
<b>If the charter school is an independent LEA within a SELPA</b>			
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			
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			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>Required Declaration</b>			
Evaluation Criteria: EC § 47605(c)(6) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>Required Affirmations</b>			
Evaluation Criteria: EC § 47605(e) <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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 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 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, except that an existing public school converting partially or entirely to a charter school under this part shall adopt and maintain a policy giving admission preference to pupils who reside within the former			

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School Name: Click or tap here to enter text.

attendance area of that public school			
5. Affirmation that the charter school shall admit all pupils who wish to attend the charter school			
6. Affirmation that the school will comply with federal, state and local laws as required for charter schools			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>For Alternative Education Charter Schools, If Applicable</b>			
Evaluation Criteria: EC §58500 - 58512 <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	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 be reflected 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			
<b>COMMENTS BY REVIEW TEAM:</b>			

<b>Independent Study/Non-Classroom Based Instruction - For Renewals Only</b> (There is a 2-year moratorium on the approval of new petitions effective January 1, 2020 to January 1, 2024)			
Evaluation Criteria: EC §51745 <b>THE PETITION DESCRIBES, AT MINIMUM</b>	Evaluation Standard Met		Located on Page(s)
	YES	NO	
1. An assurance that the K-12 public school guidelines for independent study will be evident in the annual audit per Education Code 47612.5(b)			
2. An assurance that the charter will meet the requirement related to the ratio of ADA to FTE certificated employees as prescribed under Education Code 51745.6(a)			
3. An acknowledgement that independent study will be supervised by an appropriately credentialed teacher per EC 51747.5(a)			
4. An acknowledgement that the charter 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 EC 51747.5(b)			
5. A description of how the required Written Agreement for each pupil will be processed and maintained, including at a minimum the following:			
a. The manner, time, frequency, and place for submitting a pupil's assignments and for reporting his/her progress			
b. The objectives and methods of study for the pupil's work, and the methods utilized to evaluate that work			
c. The specific resources, including materials and personnel that will be made available to the pupil			
d. 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			

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School Name: [Click or tap here to enter text.](#)

e. 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			
f. A statement of the number of course credits, or for elementary grades other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion			
g. 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			
6. 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			
7. The number of missed assignments that will be allowed before an evaluation is conducted to determine whether it is in the best interest of the pupil to remain in independent study, or whether he/she should return to a regular school program			
8. An assurance that 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			
<b>COMMENTS BY REVIEW TEAM:</b>			

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**GLOSSARY**

TERMINOLOGY	DEFINITION
ADA	average daily attendance OR Americans with Disabilities Act
affiliated school(s)	current or past charter schools that are connected, in any way, to a proposed charter school petition
affirmation	confirmation or declared statement that something is true
authorizer	governing board of a school district or county office of education that approves a charter petition
authorizing agency	district/county office of education that provides the day-to -day oversight and monitoring of an approved charter school
charter	approved charter school petition
charter governing board	governing body responsible for making leadership decisions regarding the charter school's educational, management and financial operations
charter management organization	organization that operates multiple charter schools in one or more school district
charter school petition	document that is submitted to a district or county office for the operation of a public charter school
corporate affiliations	person that is connected with other charter schools or organizations that provide services to charter schools
EC	California Education Code
evaluation criteria	benchmark against which conformance, performance, and suitability of a plan, as well as of risk-reward ratio, is measured
evaluation matrix	tool/method used to evaluate a number of options against a number of criteria
evaluation rubric (aka rating definitions)	scoring guide used to define the expectation of a quality response to the petition evaluation criteria
findings of fact	specific facts that support one or more underlying reasons for the denial of a charter school petition under consideration
initial petition	submission of a new charter school petition to a district or county office for consideration of opening a charter school
LEA	local educational agency
lead petitioner	person who is the main contact for the submission of a charter petition
MOU/Agreement	memorandum of understanding that describes the broad outlines of an agreement and communicate the mutually accepted expectations of all parties involved
petition appeal	submission of a charter school petition to a county office or state board of education that was initially submitted and denied by a district
petition review team	district or county office staff with expertise in various areas of K-12 education, assigned to review a charter school petition
petitioner	person(s) submitting an application, or "petition" to open a public charter school
renewal petition	submission of documents as required by law to renew an existing charter school
SBE	State Board of Education
SELPA	special education local plan area
SPED	special education

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