# OUSD New Charter School Petition Evaluation Criteria-Staff Report

Instructions:

This template is intended to guide **staff** through the Formal Quality Petition Review of new charter school petitions consistent with the California Charter Schools Act and the OUSD New Charter School Petition Application Guide for new schools to open in the 2018-2019 school year. Reviewers will score key categories within five domains (in addition to the Addendum for Existing Providers, where applicable):

* + Domain 1:Educational Program (Element 1);
	+ Domain 2: Student Performance & Assessments (Elements 2-3);
	+ Domain 3: Governance Structure (Element 4);
	+ Domain 4: Equity, Access & Diversity (Elements 7, 8 & 10); and
	+ Domain 5: School Operations & Policies (all other Elements).

Evaluators will rate responses by applying the following ratings:

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| **Rating** | **Characteristics** |
| **Meets or Exceeds the Standard:** | The response reflects a thorough understanding of key issues. It addresses the topic with specific and accurate information that shows thorough preparation; presents a clear, realistic picture of how the school expects to operate; and inspires confidence in the applicant’s capacity to carry out the plan effectively. |
| **Partially Meets the Standard:** | The response meets the criteria in some respects, but lacks detail and/or requires additional information in one or more areas. |
| **Does Not Meet the Standard:** | The response is wholly undeveloped or significantly incomplete; demonstrates lacking preparation/capacity; or otherwise raises substantial concerns about the viability of the plan or the applicant’s ability to carry it out. |

## ****Domain 1: Educational Program (Element 1)****

Statutory References: E.C. § 47605(b)(1)

E.C. § 47605(b)(5)(A)-(C)

The education program should tell you who the school expects to serve; what the students will achieve; how they will achieve it; and how the school will evaluate performance. It should give you a clear picture of what a student who attends the school will experience in terms of educational climate, structure, materials, schedule, assessment and outcomes.

### A. Target Population & Community Need (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Includes a coherent description of the students the school expects to serve (including demographics, educational and social-emotional needs) based on a thorough understanding of the district population and the location in which the school expects to operate.
2. Includes **Surrounding Schools Demographics & Performance Data (see Appendix F) and** demonstrates sufficient understanding of the educational needs of the target population and explains how the proposed school will meet those needs in conjunction with the schools in the surrounding area.
3. Describes meaningful, diverse outreach efforts and involvement with parents/guardians and community members in creating the charter petition as well as representation on the school's board and/or founding team.
4. Includes **Meaningfully Interested Signatures, (see Appendix J**) and provides evidence of support from prospective parents, teachers, and/or students and community partners.
5. Includes a description of the manner in which community feedback impacted the contents of the charter petition.

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| **Target Population & Community Need** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses** |
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### B. Philosophy & Approach to Instruction (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Specifies a clear, concise school vision and mission statements, which align with all elements and programs of the school and meet the needs of the targeted population.
2. Provides a persuasive explanation of why the philosophy and approach, grounded in research-based educational practices and high standards for student learning, are appropriate for and likely to result in improved educational performance for the target population, including any available performance data from use of the same educational philosophy and approach to instruction with similar populations.

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| **Philosophy & Approach to Instruction** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### C. Instructional Design (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Includes a framework for instructional methods and strategies aligned with the needs of the pupils that the charter school has identified as its target student population.
2. Indicates how the curriculum is research-based, addresses CA Common Core State Standards, and meets target population needs.
3. Includes the curriculum/textbooks or other instructional resources to be used.
4. For curriculum yet to be developed, includes a thorough, persuasive plan for development including the research base to be considered. Includes a realistic, time-specific development schedule and clear objectives to be, as well as the identification of the foundational materials and individuals responsible for the curriculum development and evidence that they are well- qualified for the task.
5. Describes how the instructional program will provide and support student development of technology-related skills and how the school will ensure that students will be prepared to take computer-based state standardized assessments.
6. **For secondary schools (departmentalized middle schools and high schools),** provides a comprehensive course list or table that shows all course offerings for all grades to be served.

**For High Schools only:**

1. Specifies how the instructional program will meet graduation and A-G requirements.
2. Describes the timeline that the charter school will follow for obtaining WASC accreditation.
3. Describes how charter school will inform parents about transferability of courses to other public high schools and eligibility of courses to meet college entrance requirements. (Courses that are accredited by WASC may be considered transferable, and courses meeting the A-G admissions criteria may be considered to meet college entrance requirements.)
4. **For schools offering International Baccalaureate,** or any other complex instructional framework that must be phased in over time, describes the school’s plan and timeline for implementing the various phases or components of the program.
5. **For schools offering Transitional Kindergarten**, includes a description of the school’s Transitional Kindergarten program.
6. **For schools offering summer school**, describes the summer school program with details including how many students are expected to attend, how they will be selected for participation, how many hours and weeks will be provided, and how it will be funded, as well as what specific student needs the summer school will address.

**Academic Calendar & Schedules**

1. Includes the school’s academic calendar and schedules that are internally consistent.
2. Includes **Instructional Days and Minutes Calculator Chart (see Appendix G)** and a comprehensive set of sample daily schedules (regular, early dismissal, minimum day), which explain the rationale for allocation of instructional time to different subject matter areas.

**Staffing & Professional Development**

1. Describes how teachers will be recruited and developed to successfully deliver the proposed educational program.
2. Describes how the school will provide ongoing professional, specifying a list of topics, for the first year of the charter term.

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| **Instructional Design** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### D. School Culture (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Describes school cultural values that are inclusive of all students and promote a positive academic environment and reinforces student intellectual and social development.
2. Describes sound systems and practices to foster this culture, starting from the first day of school.
3. Includes a description of the extracurricular activities or programming the school will offer, how often they will occur, who will manage or oversee the activities, and how will they be funded. Activities are aligned with and support the school's mission and culture.

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| **School Culture** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### E. Student Recruitment & Enrollment (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Specifies that enrollment is available to all students and includes a sound enrollment and recruitment plan, including admission requirements or priorities, or lottery policies, as well as systems for student recruitment, including activities and events.
2. Indicates that the school has conducted targeted outreach to families in poverty, academically low-achieving students, students with disabilities, linguistically diverse families and other youth at risk of academic failure, and that the enrollment system will provide equitable access.
3. Includes an ambitious target re-enrollment rate.
4. Includes sufficient plans for ongoing student enrollment once the school is open.

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| **Student Recruitment & Enrollment** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### F. Student Engagement & Satisfaction (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Describes a goal for student attendance (including tardiness and truancy) that can be expected to ensure high rates of student attendance.
2. Identifies an individual or position responsible for collecting and monitoring attendance data and describes what will be done in the event the school does not reach its attendance goals.
3. **For high schools,** describes a plan for drop-out recovery and persistence plans for students at-risk of dropping out.

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| **Student Engagement & Satisfaction** |
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### G. Community School: Ongoing Family Involvement & Satisfaction (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Describes the partnerships the school will have with community organizations, businesses, or other educational institutions, including the nature, purposes, terms, and scope of services of any such partnerships.
2. Describes how the school will specifically engage families in the school’s culture.

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| **Community School: Ongoing Family Involvement & Satisfaction** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### H. Special Populations: Identification, Remediation, & Acceleration (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

**Special Education**

1. Explains how the school will use bodies of evidence to identify students with disabilities and special needs.
2. Provides a sound plan -- including lead contact, funding, service and intervention arrangements -- for identifying and meeting the needs of students identified with disabilities.
3. Includes evidence of high expectations for students with special needs.
4. Identifies which staff will be responsible for identification and the process used to identify students, as well as ways in which the school will avoid misidentification.
5. Provides a clear statement regarding what petitioners expect will be the school’s anticipated LEA status for purposes of special education and the implications of that status determination.
6. Describes how and when the school will provide school wide professional development to special education and general education teachers to serve the needs of special needs students.

**Response to Intervention**

1. Describes how the school will implement Response to Intervention (RTI) in a manner that meets the state’s requirements and that includes specific research-based strategies to support students in Tiers I, II, and III, including both academic and behavioral interventions.
2. Describes specific interventions to be employed to help close achievement gaps.

**Gifted/ Talented Students & Academically Advanced Students**

1. Identifies which staff will be responsible for identification and explains the process used to identify gifted/talented and academically advanced students as well as the criteria that will be used to determine exceptional ability or potential.
2. Describes the research-based instructional programs and strategies the school will use to appropriately address the educational needs of gifted students and any additional instructional materials to be employed.

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| **Special Populations: Identification, Remediation, & Acceleration** |
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| **Strengths**  | **Weaknesses**  |
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### I. Special Populations: English Learners (Element 1)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Describes the school's philosophy and approach to language instruction and the components of this approach, and a sufficient research base to support it.
2. Describes how the school will ensure content-area curriculum and instruction is accessible to English Learners (ELs) of all proficiency levels and typologies, including newcomers, Students with Interrupted Formal Education (SIFE), and Long-term ELs.
3. Describes how the school will structure English Language Development and the curriculum and instructional resources to be used.
4. Describes systems of professional development and collaboration to be put in place to support teachers to meet the needs of ELs.
5. Includes an instructional schedule that addresses the needs of diverse language learners.
6. **For high schools**, describes a plan to ensure that ELs, including newcomers, receive the required A-G courses to keep them on track to graduation?
7. Includes a plan for identifying and assessing the language and literacy needs of the school's ELs and a plan for ELs who are not demonstrating adequate progress, including specialized instruction or courses to accelerate language, literacy and academic skills for these students.
8. Includes a plan for how the school will communicate to families EL students' progress.
9. Includes a plan for leveraging community partners to provide programs and services to meet the needs of newcomers/ELs and their families.
10. Explains how staff will integrate the ELs into the greater school community.
11. Includes plans to ensure adequate translation services during all school meetings.

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| **Special Populations: English Learners** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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## ****DOMAIN 2: Student Performance & Assessments (Elements 2 & 3)****

Pupil outcomes are central to the school’s existence. They represent the school’s definition of success and should drive all aspects of the program and operation.

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Includes **OUSD's Collective Measureable Pupil Outcomes (MPOs) available on OUSD’s website www.ousdcharters.net.**
2. Includes **State Priorities Under LCFF (see Appendix H)**, as well as a description of the school's annual goals and a description of the specific annual actions the school will take to achieve each of the state's identified annual goals.
3. Identifies formative assessments to be used by the school to assess student progress on an ongoing basis and how frequently the assessments will be administered.
4. Outlines a plan for collecting, analyzing, and reporting data on pupil achievement to school staff and to pupils’ parents and guardians, and for utilizing the data continuously to monitor and improve the charter school’s educational program.
5. Describes how assessment data will be used to inform instruction and professional development on an ongoing basis.
6. Describes clear and fair grading, promotion/retention policies and procedures.

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| **Student Performance & Assessments**  |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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## ****DOMAIN 3: Governance Structure (Element 4)****

The Charter Schools Act requires the authorizer to determine whether the petitioners are “demonstrably unlikely to successfully implement the program.” Experience with new school development demonstrates that unless petitioners have sound plans and capacity for governance, management, employment and financial operation, they are unlikely to successfully implement the program. This section should provide a clear, convincing picture of the petitioners’ capacity to operate the school successfully.

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

### ****Governance Structure (Element 4)****

1. Provides an organizational chart which indicates how the charter school will become and remains a viable enterprise and shows the relationship of the governing board to the leadership of the school, as well as any relevant site committees.
2. Indicates qualifications and the selection process for governing board members, including the length/rotation of service terms.
3. Specifies how often and where the governing board will meet
4. Provides by-laws for the nonprofit public benefit corporation, including a description of the decision making process, and states the manner for setting the annual calendar, posting meeting notices, distributing agendas, and recording governing board actions.
5. Includes evidence that the organizational and technical designs of the governance structure reflect a seriousness of purpose necessary to ensure that there will be active and effective representation of interested parties, including, but not limited to all staff and parents/guardians.
6. Presents a clear and fair dispute resolution process.
7. Includes evidence of the charter school’s incorporation as a non-profit public benefit corporation

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| **Governance Structure**  |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### ****Operating Plans & Procedures (Element 4)****

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Provides a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals.
2. Includes a completed **School Staffing Model and Rollout Table** outlining the school staffing rollout plan.
3. If the school will provide transportation, describes the transportation arrangements for prospective students and how the school plans to meet transportation needs for field trips and athletic events.
4. Describes how the school will ensure students' nutritional needs are met during the school day and includes a list of prospective vendors.
5. Includes a list of the types of insurance coverage the school will secure, including a description of the levels of coverage. Types of insurance should include workers’ compensation, liability, property, indemnity, directors and officers, and automobile.
6. Includes a provision by which the Charter School agrees to defend, indemnify and hold harmless the District against any and all liability and claims arising out of the Charter School’s acts, errors and omissions.

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| **Operating Plans & Procedures** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### Budget/Financial Plan (Element 4)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Includes all completed budget spreadsheets, consisting of:
* **Multi-Year Budget Projection Excel Sheet,** including the projected budget for the school's start-up year and the first three years of the proposed school's operation. All tabs must be completed.
* **FCMAT** **LCFF Calculator**
* **Three-Year Cash Flows Excel Sheet**
1. Presents a detailed budget narrative including all assumptions and revenue estimates as well as the basis for revenue projections, staffing levels, and costs, as well as the degree to which the school budget will rely on variable income.
2. Discusses the school’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.
3. Provides a compensation plan based on sound budget assumptions that reflects understanding of the prevailing market and supports the proposed educational program.
4. Describes the systems, policies and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements.
5. Describe the roles and responsibilities of the school’s administration and governing board for school finances and distinguish between each.
6. Describes any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services.

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| **Budget/Financial Plan** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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## ****DOMAIN 4: Equity, Access & Diversity (Elements 7, 8 & 10)****

*NOTE: Elements 5, 6, and 9 are addressed in Domain 5.*

### ****Racial & Ethnic Balance (Element 7)****

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Includes a completed **District & Surrounding School Racial & Ethnic Demographics Table (see Appendix I)**.

2. Describes how leaders will ensure that the proposed school enrolls children of diverse racial and ethnic backgrounds that reflect the demographics of Oakland and/or the region of the proposed school, including a thorough description of annual outreach efforts, describing what methods the school will use to advertise and recruit students, what geographic areas will be targeted in the outreach effort, and what languages will be used to do the outreach.

3. Describes how the school will recruit and reach out to students with a history of low academic performance, socio-economically disadvantaged students, ELs, and students with disabilities.

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| **Racial & Ethnic Balance**  |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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### Admission Requirements (Element 8)

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Describes the specific admissions and enrollment process, including admission preferences of the proposed school.

2. Describes the manner in which the school will implement a public random drawing in the event that applications for enrollment exceed school capacity. This description should address:

* The method the school will use to communicate to all interested parties the rules to be followed during the open enrollment and lottery processes.
* The method the school will use to verify lottery procedures are fairly executed.
* The timelines under which the open enrollment period and lottery will occur.
* The location where the lottery will occur and the efforts the school will undertake to ensure all interested parties may observe the lottery.
* The date and time the lotteries will occur so interested parties will be able to attend.
* The procedures the school will follow to determine waiting list priorities based upon lottery results.
* The means by which the school will contact the parents/guardians of students who have been promoted off the waiting list and timelines under which parents/guardians must respond in order to secure admission.
* The records the school shall keep on file documenting the fair execution of lottery procedures.

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| **Admission Requirements**  |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### ****Suspension & Expulsion Procedures (Element 10)****

In addition to containing all District Required Language, a petition sufficiently meets this standard if it:

1. Describes the key elements of the school discipline policy and how it will support a positive school culture, including school-wide positive behavior support and restorative practices, alternatives to suspension, and professional development.
2. Describes how the discipline strategy will be implemented in the classroom, including what teaching strategies will be used to ensure students are on task and focused on learning.
3. Describes a plan to ensure minority students and students with disabilities are not disproportionately represented in disciplinary procedures such as suspensions and expulsions. Includes a plan to track this data.
4. Outlines how detailed policies and procedures regarding suspension and expulsion will be developed and periodically reviewed, including, but not limited to, periodic review and (as necessary) modification of the lists of offenses for which students are subject to suspension or expulsion.

**Grounds for Suspension and Expulsion**

1. Identifies a preliminary list of the offenses for which students in the charter school must (where non-discretionary) and may (where discretionary) be suspended and, separately, the offenses for which students in the charter school must (where non-discretionary) or may (where discretionary) be expelled, providing evidence that the petitioners reviewed the offenses for which students must or may be suspended or expelled set forth in the Education Code for non-charter public schools.
2. Identifies the procedures by which pupils can be suspended or expelled.
3. Identifies the procedures by which parents, guardians, and pupils will be informed about reasons for suspension or expulsion, their due process rights, and how they may appeal the suspension.

**Suspension Procedures**

1. Identifies the maximum number of days a student may be suspended for any single offense and the maximum total number of days a student may be suspended within one academic year.
2. Describes how students will access education during the suspension or expulsion.
3. Provides evidence that in preparing the lists of offenses specified and procedures specified above), the petitioners reviewed the lists of offenses and procedures that apply to students attending non-charter public schools, and 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 pupils and their families
4. Provides for due process for all pupils and demonstrates an understanding of the rights of pupils with disabilities in regard to suspension and expulsion.

**Expulsion Procedures**

1. Describes the school’s specific rules and procedures for student expulsion and specifically addresses:
* How the school will provide to the student and parent adequate notice of the reason for potential disciplinary action and a meaningful opportunity to be heard prior to making an expulsion recommendation
* Who has the authority, and what process must be followed, to make expulsion recommendations
* Who has the authority to make expulsion decisions
* How and when the school will hear and decide expulsion recommendations, including the provision of an impartial decision-making panel, adequate notice and meaningful opportunity to be heard, reasonable timeline, reasonable accommodations and language support, special rules and procedures for incidents involving sexual assault, right to be represented by counsel or other advocate, and other due process protections and rights
* How the school will create and maintain records of the proceedings, and make records available to students/parents
* How students/parents may appeal an expulsion decision, including provision of an impartial appeals panel, adequate notice and meaningful opportunity to be heard, reasonable timeline, reasonable accommodations and language support, and other due process protections and rights
* How the school will provide post-expulsion support to facilitate access to education for expelled students/families
1. States the procedures for rehabilitation, readmission and interim placement.

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| **Suspension & Expulsion Procedures**  |
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| **Strengths**  | **Weaknesses**  |
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## ****DOMAIN 5: School Operations and Policies (Elements 5-6, 9, 11-16)****

The Charter Schools Act requires authorizers to evaluate whether the petitioners have presented a “reasonably comprehensive” description of the 16 Elements related to a school’s operation. All Elements not included in the previous Domains, as well as the required petition Appendices, are listed in the sections below.

Mark the "Reasonably Comprehensive" box for each item only if it is present in the petition and its contents are internally consistent with the rest of the petition.

### Employee Qualifications (Element 5)

 **Operations Capacity**

1. Describes the founding team’s individual and collective qualifications for implementing the Education Program and Operations Plan successfully, including capacity in areas such as the following:

• Staffing;

• Professional development;

• Performance management (staff, administrators, and teacher evaluations);

• General operations; and

1. Describes the organization’s capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

**Employee Positions and Qualifications**

1. Provides a list of all school employees, including a staff organizational chart that shows the supervisorial relationships among and between the school's staff, including all school employee classes/positions (administrators, certificated staff, instructional support staff, and classified staff).
2. Provides a job description for each position and describes the minimum and desirable qualifications.

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| **Employee Qualifications** |
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### Health and Safety Procedures (Element 6)

1. Describes how the school will support and promote the health and wellness of its students. (See, e.g., the Healthy, Hunger-Free Kids Act of 2010.)
2. Provides the school plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.
3. Identify which position(s) will serve as the school’s Custodian(s) of Records per California Department of Justice requirements.

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| **Health and Safety Procedures** |
| **Inadequate** | **Reasonably Comprehensive** |
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| **Strengths** | **Weaknesses** |
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| **Remaining Elements/Sections** | **Inadequate** | **Reasonably****Comprehensive** |
| Element 9: Annual Financial Audits | [ ]  | [ ]  |
| Element 11: Employee Retirement Systems | [ ]  | [ ]  |
| Element 12: Public School Attendance Alternatives | [ ]  | [ ]  |
| Element 13: Rights of District Employees | [ ]  | [ ]  |
| Element 14: Mandatory Dispute Resolution | [ ]  | [ ]  |
| Element 15: Charter School Closure Procedures | [ ]  | [ ]  |
| District Impact | [ ]  |  [ ]  |
| Budget/Financial Plan | [ ]  |  [ ]  |
| Addendum for Existing Providers (if applicable) | [ ]  | [ ]  |
| Appx. B – OUSD’s 5 Pillars of Quality School Development | [ ]  | [ ]  |
| Appx. C – Certification Statement | [ ]  | [ ]  |
| Appx. D – Charter School Roster of Key Contacts | [ ]  | [ ]  |
| Appx. E – Statement of Assurances | [ ]  | [ ]  |
| Appx. F – Surrounding Schools Demographic and Performance Data | [ ]  | [ ]  |
| Appx. G – Instructional Minutes & Days Calculator | [ ]  | [ ]  |
| Appx. H – State Priorities under LCFF | [ ]  | [ ]  |
| Appx. I – District & Surrounding School Racial & Ethnic Demographics | [ ]  | [ ]  |
| Appx. J – Meaningfully Interested Signatures | [ ]  | [ ]  |
| Appx. K – Due Diligence Questionnaire  | [ ]  | [ ]  |
| Appx. M–Exclusive Employer Declaration | [ ]  | [ ]  |

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| **Strengths**  | **Weaknesses**  |
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## *Domain 5 Application Questions (For Reference Only)*

### Annual Financial Audits (Element 9)

A “reasonably comprehensive” petition will include, in addition to the District Required Language, the following:

**Annual Audit Procedures**

1. Specify what person or position at the charter school is responsible for contracting with an accountant to conduct the required annual financial audit.
2. Specify what person or position at the charter school is responsible for working with the auditor to complete the audit.
3. Describe how the school will ensure that the selected auditor is on the State Controller’s list of approved auditors to conduct charter school audits.
4. Describe the process that the charter school will employ to address and resolve any deficiencies, findings, material weaknesses, or audit exceptions.
5. Specify what person or position at the charter school is responsible for ensuring that the auditor sends the completed audit to the required agencies by the statutory deadline.
6. Describe how the school will ensure financial transparency to the district and the public, including its plans for public adoption of its budget and public dissemination of its annual audit and an annual financial report.

### Employee Retirement Systems (Element 11)

A “reasonably comprehensive” petition will include, in addition to the District Required Language, the following:

1. Specify the certificated positions that will be covered under each retirement system and the staff who will be responsible for ensuring that appropriate arrangements for that coverage have been made.
2. Specify any other staff positions, not included in the other two categories, that will be covered under each retirement system and the staff who will be responsible for ensuring that appropriate arrangements for that coverage have been made.

### Public School Attendance Alternatives (Element 12)

A “reasonably comprehensive” petition will include, in addition to the District Required Language, the following:

1. Address how parents and students will be informed of their public school attendance alternatives.

### Rights of District Employees (Element 13)

A “reasonably comprehensive” petition will include the District Required Language.

### Mandatory Dispute Resolution (Element 14)

A “reasonably comprehensive” petition will include, in addition to the District Required Language, the following:

1. Provide the specific address for written notifications to the school pursuant to the procedures set forth in the District Required Language for this Element. Please use the following format:

[Name of Charter School]

c/o [Title (e.g. Director)]

[Full Address]

### Charter School Closure Procedures (Element 15)

A “reasonably comprehensive” petition will include the District Required Language.

## Addendum for Existing Providers (if applicable)

A petition sufficiently meets this standard if it:

### A. Curriculum & Instructional Design Supplement

1. Includes a clear and compelling description of the organization’s approach to replicating and implementing the school model, including curriculum and instructional design among multiple schools.
2. Provides sensible rationale and identifies resources for any key educational features that would differ from the organization’s current model.

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| **Curriculum & Instructional Design Supplement** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths**  | **Weaknesses**  |
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### B. Network Vision, Growth Plan, & Capacity

1. Includes a well-defined, thoughtful strategic vision and five-year growth plan for developing new schools locally and elsewhere, if applicable. This should include: years of opening; number and types of schools; any pending applications; all currently targeted markets/communities and criteria for selecting them; and projected numbers of students.
2. Demonstrates organizational and management capacity to execute the school replication plan successfully – and to support and ensure the quality and long-term success of all proposed schools – as evidenced by:
	* The organization’s annual report for the last two years;
	* A sound, well-developed business plan;
	* Sound description of tasks and timelines for building or deploying organizational capacity to support the proposed schools; and
	* Successful school development, management, and replication experience.
3. Demonstrates the ability to learn from past school management/replication challenges, including thoughtful discussion of specific challenges and mitigation strategies.
4. Demonstrates consideration of risks and challenges to achieving desired outcomes in OUSD over the next five years and realistic, effective strategies for addressing them.

**Network Management**

1. Includes evidence of a capable network leadership team with sensibly defined roles and responsibilities and demonstrated capacity to lead the short- and long-term success of the school(s) as part of the growing network.
2. Includes a sound plan and structure for any shared or centralized support services, including a description of the services, network staffing, costs (amount and allocation aligned with budget), specific service goals and how the organization will measure the successful delivery of these services.
3. Demonstrates clear, effective assignment of school- and organization-level decision-making responsibility for key functions such as curriculum, professional development, culture, staffing, etc. as evidenced by the table provided.
4. Includes clear, sensible, complete organization charts depicting the governance and management structure for:
* The network as a whole (including both network management and schools within the network) in Years 1, 3, and 5;
* The school model (one school) in Year 1 and at full expansion.

The charts should delineate sound assignment of roles and responsibilities – and clear lines of authority among – (as applicable) the board, all management staff, any related bodies or councils, and any external organizations that will play a management role. The charts should also present clear lines of authority and reporting within the school.

**Network Governance & Legal Status**

1. Includes a clear description of an effective governance structure at both the network and individual school levels, including an explanation of whether each school/campus will have an independent governing board, whether there will be a single network-level board governing multiple schools, or both a network-level board and boards at individual schools.
2. Presents a clear description of the organizational relationship between the network-level board and boards at each school, including the legal status of each board, and the scope of authority of each.
3. Presents a clear description of an effective governance structure in the absence of a network-level board.
4. Describes governing bylaws, policies, and procedures that support the charter school expansion/replication plan.
5. Includes a sound, timely plan for increasing the capacity of the governing board to govern multiple schools, including a sound plan and timeline for board recruitment, expansion, orientation of new members, and ongoing training for members. Plan should include a thoughtful identification of desired experience and capacities beyond what the board already possesses and necessary for the governance of multiple schools.
6. Includes a plan for clear identification and plan for addressing board development needs relative to growth.
7. Explains how the interests of individual schools will be balanced with network interests and how key stakeholders will be represented.
8. Provides evidence that the proposed governing board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school including educational, financial, legal, and community experience and expertise.
9. Presents clear, appropriate plans for the board(s) to evaluate the success of the school(s) and school leader(s).

**Network Leadership Pipeline**

1. Includes a sound plan for sourcing and training potential leaders for future campuses and for developing a pipeline of potential leaders for the network.

**Network-wide Staffing**

1. Includes table outlining plans for sensible five-year network staffing that will support high-quality replication at the scale proposed, while continuing success in existing schools.

**Network Performance Management**

1. Describes meaningful mission-specific educational and organizational goals and targets, which are measurable or demonstrable by externally credible measures or assessments.
2. Includes effective plan (including qualified personnel) and system for measuring and evaluating academic progress – of individual students, student cohorts, each school, and the network as a whole – throughout the school year, at the end of each academic year, and for the charter term.
3. Describes thoughtful, appropriate corrective actions the school and network will take if they fall short of the authorizer’s (or the operator’s) goals at any level, including explanation of what would trigger such actions and who would implement them.
4. Includes a sound plan for monitoring performance of the portfolio as a whole and thoughtfully considering portfolio performance in decisions regarding continued growth and replication.

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| **Network Vision, Growth Plan, & Capacity** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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### C. Performance Evaluation Information

1. Includes thoughtful discussion of a high-performing school in the network, including the evidence basis for judging the school as high-performing; causes for success; challenges overcome; and how the school’s effective practices have been implemented elsewhere in the network
2. Includes thoughtful discussion one of the lowest performing schools in the network, including the evidence basis for judging the school unsatisfactory; causes of underperformance; and specific strategies and expectations (performance levels and timeframe) for improvement
3. Includes three years of independent financial audit reports and management letters; and the most recent internal financial statements, including balance sheets and income statements, with distinct representation of the CMO level and the overall operations.
4. Provides satisfactory performance records and demonstrated capacity to learn from past challenges/mistakes, as evidenced by a thoughtful, well reasoned, and evidence-based discussion of any of the following experiences: record of any charter revocations or non-renewals; shortened or conditional renewals; withdrawals or non-openings; performance deficiencies or violations that have led to formal authorizer intervention; current or past litigation involving the organization or any of its schools

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| **Performance Evaluation Information** |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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