Oakland Unified School District

**Office of Charter Schools**



Oakland Unified School District

New Charter School Petition Application Guide

For new schools to open in 2019-2020

Office of Charter Schools

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Oakland, CA 94607

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[www.ousdcharters.net](http://www.ousdcharters.net/)

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# INFORMATION FOR PETITIONERS

## Introduction

Oakland Unified School District is pleased to invite proposals for high-quality charter schools seeking to open in the 2019-2020 school year. As a charter Authorizer, the District reviews charter proposals to ensure that every Oakland family has the ability to select from a diverse range of quality educational options throughout Oakland. Oakland charter schools play a large and significant role in providing educational options to families and in turn, to fulfilling the Oakland Unified School District’s vision. As of 2018, 34 charter schools are authorized by and operating in the Oakland Unified School District.

Under state law, Authorizers are charged with approving quality charter proposals that contain reasonably comprehensive descriptions of the 15 Elements under California Charter Schools Act, and declining to approve weak or inadequate charter proposals. Additionally, pursuant to Education Code § 47605(a)(1), all charter proposals are required to submit **Meaningfully Interested Signatures Forms (see Appendix J). Charter proposals without the required signatures will be returned and the petitioner will have to resubmit once the statutory requirement is met.**

The Oakland Unified School District, specifically, seeks proposals that align with **OUSD's 5 Pillars of Quality School Development (see Appendix B)**.

Applying for a charter school requires a petitioner to provide a large amount of documentation of policies and procedures. We encourage petitioners to visit successful schools (charter and non-charter) and speak with school operators and charter school governing boards to inform their plans. The policies and procedures that applicants create are meant to be ones that could be used by a school’s faculty, staff, administrators and school governing board members should a petition be approved and should reflect the school’s fundamental mission and vision.

All proposed governing board members and proposed site administrators must complete and submit a **Due Diligence Questionnaire (see Appendix K)**.

## ­­­New Petition Submission and Review Timeline

## Petition Instructions & Format Guidelines

**BOE Votes to Approve/Deny Charter**

***To Occur Within 60-90 days of Submission***

**Letter of Intent Submitted to OCS Prior to Petition Submission (Recommended) no)**

**New Petition to be submitted during Public Comment at a Regularly Scheduled OUSD Board of Education (BOE) Meeting**

**OCS Makes Recommendations to BOE**

**(Staff Report)**

**Staff Report**

**Public Hearing at BOE Meeting**

***To Occur Within 30 Days of Submission***

**Part I: Evaluation of Petition**

**Part II: Petitioner Interviews**

**New Petition Review Process**

**Letter of Intent:** It is recommended thatall applicants submit a **Letter of Intent (see Appendix A)** to the Office of Charter Schools prior to submitting a complete charter school petition.

|  |
| --- |
| Mail or Email Letters of Intent to: |
| Office of Charter Schools  1000 Broadway, 6th Floor, Suite 639  Oakland, CA 94607  P: (510) 879-1677  Email: [brett.noble@ousd.org](mailto:brett.noble@ousd.org) & [elizabet.wendt@ousd.org](mailto:elizabet.wendt@ousd.org) |

**Petition Content:** The California Charter Schools Act designates the contents required in a new charter school petition, which must align with the law's 15 Elements related to a school’s operation. Authorizers must evaluate whether the petitioner has presented a "reasonably comprehensive" description of each Element.

A complete petition must include each section outlined in this guide (e.g., Executive Summary & Overview Tables, Element 1, etc.). Within each section, please use the outline headings we have provided. A complete petition will answer all questions posed in this guide in the same order they appear here, and include all required charts, budget, and forms listed in the Petition Checklist. If a particular question does not apply to your proposal, please respond “Not Applicable” and include a statement as to why the question is not applicable to your team or proposal. Brevity, specificity, and clarity are strongly encouraged.

**District Required Language:** All petitions must include District Required Language. See “**District Required Language”** available on the OUSD website at <http://www.ousdcharters.net/new-petition-application.html>. Please be sure to highlight in gray all District Required Language (DRL) throughout the petition document.

Please ensure that all language and documents provided in the petition are consistent with and not duplicative of the “District Required Language” (DRL). Consistency should also be apparent between the petition, supplemental documents, and the school’s submitted bylaws.

**Format:**

**Submission to the OUSD Board of Education** *(at a regularly scheduled OUSD Board meeting)*

* Every new charter petition submission must consist of one (1) hard copy and a flash drive containing one (1) electronic copy of the entire submission, exactly as filed, in PDF format with bookmarks, identical to the table of contents.

**Submission to the Office of Charter Schools** *(the day following Board submission)*

* Three (3) additional hard copies and one (1) electronic copy (via flash drive or email) containing MS Word and Excel formats (i.e. budget) of the documents **AND** one (1) copy of the entire submission, exactly as filed, in PDF format with bookmarks, identical to the table of contents must be submitted directly to the Office of Charter Schools. Please note, the Office of Charter Schools cannot accept any additional documentation other than what was formally submitted at the Board meeting.
* Charter petitions must include tabs separating each of the 15 Elements and individual Appendices. Include each major section header and each sub-section header, but do not include the question prompt in your typed response.
* All copies should be prepared double-sided on plain, 8 ½ x 11” sized paper that is suitable for reproduction
* Use 12-point Times New Roman font and one-inch margins
* All pages must be numbered.

**Appendices**:

* Complete all required appendices. Templates and forms for the Appendices are provided in the back of this application guide and can be downloaded in other file formats from the “New Petition Application Forms” section of our website (<http://www.ousdcharters.net/new-petition-application.html>) to be filled out and included as part of the application.
* Separate appendices with a labeled tab that uses the appendix letter and name (e.g., Appendix A- Letter of Intent)

To confirm that you have reviewed your petition for completeness, please complete the **Petition Checklist** on the following pageand submit the completed checklist along with your application.

**Submission of Petition:** Requests for a new charter should be submitted during Public Comment at a regularly scheduled OUSD Board of Education Meeting. Petitioners are strongly encouraged to file no later than November 15 of the year prior to their proposed school opening. In the case of petitions received after that date, the Governing Board reserves the right to consider approval on the basis of a one-year delay in the commencement of charter school operation.

District staff will advertise a Board Public Hearing within 30 days of the filing and initiate staff work to support a recommendation to the Board for action within 60 days of filing. Petitioners and the District may mutually agree to extend the decision-making process for up to 30 additional days. Concurrence will be recorded in writing and signed by both parties. (cf. Education Code 47605(b)).

Petitioners will be allotted ten (10) to fifteen (15) minutes for a presentation at the public hearing.  If petitioners wish to include an electronic presentation program (e.g., PowerPoint), they must provide a pptx file as an email attachment to the Executive Secretary of the Governing Board, [Edgar.Rakestraw@ousd.org](mailto:Edgar.Rakestraw@ousd.k12.ca.us), no later than 12pm on the Friday prior to the Public Hearing date.

## Petition Checklist

A complete petition must include the following components, with the exception of the Letter of Intent, which is recommended to be submitted to OCS prior to submission of the full charter petition.

|  |  |  |  |
| --- | --- | --- | --- |
| **Application Component** | | **Applicant Check** | **Reviewer Check** |
| **Executive Summary & Overview Tables** | |  |  |
| **Element 1**: Educational Program | 1. Target Population & Community Need |  |  |
| 1. Philosophy & Approach to Instruction |  |  |
| 1. Instructional Design |  |  |
| 1. School Culture |  |  |
| 1. Student Recruitment & Enrollment |  |  |
| 1. Student Engagement & Satisfaction |  |  |
| 1. Community School: Ongoing Family Involvement & Satisfaction |  |  |
| 1. Special Populations: Identification, Remediation, & Acceleration |  |  |
| 1. Special Populations: English Learners |  |  |
| **Elements 2 & 3:** Measurable Pupil Outcomes & Method to Measure Progress |  |  |  |
| **Element 4**:  Governance Structure | 1. Governance Structure |  |  |
| 1. Operating Plans &Procedures |  |  |
| 1. Budget/Financial Plan |  |  |
| 1. Indemnification of District |  |  |
| **Element 5**:  Employee Qualifications |  |  |  |
| **Element 6**:  Health & Safety Procedures |  |  |  |
| **Element 7**:  Means to Achieve Racial & Ethnic Balance |  |  |  |
| **Element 8**:  Admission Requirements |  |  |  |
| **Element 9**:  Annual Financial Audits |  |  |  |
| **Element 10**:  Suspension & Expulsion Procedures |  |  |  |
| **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** | A. Potential Civil Liability Effects |  |  |
| B. Indemnification of District |  |  |
| C. Facilities |  |  |
| D. Administrative Services |  |  |
| **Budget/Financial Plan** | A. Financial Statements |  |  |
| B. First-Year Operational Budget |  |  |
| C. Start-Up Costs |  |  |
| D. Cash Flow and Financial Projections for first three years of operation. |  |  |
| **Addendum for Existing Providers**  (if applicable) |  |  |  |
| **Appendices** | Appx. A – Letter of Intent (\*Recommended to be submitted to OCS prior to charter petition submission) |  |  |
| 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 Forms |  |  |
| Appx. K – Due Diligence Questionnaire |  |  |
| Appx. M – Exclusive Employer Declaration |  |  |
| **Electronic PDF copy of entire application** | |  |  |
| **Electronic copies of completed budget templates** | |  |  |

## Additional Documents To Be Included In The Petition

The following list of documents are included in the application. They should be embedded within the appropriate section of the petition outlined below and not included as a separate appendix.

|  |  |  |  |
| --- | --- | --- | --- |
| **Document Name** | **Section in the Application** | **Applicant Check** | **Reviewer Check** |
| Executive Summary and Overview Tables | Executive Summary and Overview |  |  |
| School Staffing Model and Rollout | Element 4, Section B, Question 2 |  |  |
| School- and Organization-Level Decision-Making Responsibilities | Addendum for Existing Providers, Section B, Network Management, Question 3 |  |  |
| Network-wide Staffing | Addendum for Existing Providers, Section B, Network-wide Staffing, Question 1 |  |  |
| Collective Measurable Pupil Outcomes (MPOs) | Elements 2, Question 1 |  |  |
| District Required Language | Embedded throughout |  |  |

## Petition Process & Review Stages

|  |  |
| --- | --- |
| **Submission of New Charter Petition** | Requests for a new charter should be filed during Public Comment at a regularly scheduled OUSD Board of Education Meeting. Petitioners are strongly encouraged to file no later than November 15 of the year prior to their proposed school opening. |
| **Public Hearing** | As provided by the Charter Schools Act, a public hearing will be held by the Board of Education (BOE) to allow the petitioners to speak on behalf of their charter petition, as well as allow for public comment on the proposed charter within 30 days of the submission of the charter petition.  District staff will advertise a Board Public Hearing within 30 days of a filing and initiate staff work to support a recommendation to the Board for action within 60 days of filing. Petitioners and the District may mutually agree to extend the decision-making process for up to 30 additional days.  The purpose of the hearing will be for clarification by the BOE regarding the specifics of the proposed charter, as well as an opportunity for the BOE and OCS staff to better understand the public sentiment surrounding the proposed charter. Questions and comments generated here may likely serve as the basis for questions to be posted during the petitioner interview. Petitioners must submit all presentation documents including PowerPoint presentations intended for use at the Public Hearing, to the Board Secretary [Edgar.Rakestraw@ousd.org](mailto:Edgar.Rakestraw@ousd.org) no later than 12pm on the Friday prior to the Public Hearing date. |
| **Formal Quality Petition Review** | The Formal Quality Petition Review is intended to allow for the recommended approval of only high quality charter petitions and subsequently high quality schools. The foundation of this process is the interest in establishing a sound educational program and petitioner capacity to successfully implement their proposed charter. (*Education Code* §47605(b)(1)(2)) |
| **Part I: Evaluation Process**  District staff will thoroughly read the charter petition and all supplemental materials. A review team will be convened, if necessary, with expertise focused on key areas of the petition. The **OUSD New Charter School Petition Evaluation Criteria (see Appendix L**) developed in collaboration with the *National Association of Charter School Authorizers (NACSA),* local charter school leaders, and in accordance with the Charter Schools Act of 1992 and its applicable laws and regulations, will be applied to the charter petition. The combined analysis of this review process will contribute to the overall evaluation of the charter petition. During the review process, questions will be generated in an effort to better clarify the soundness of the educational program, as well as the capacity of the lead petitioners to successfully implement the proposed charter. These questions may be posed during the Petitioner Interviews. |
| **Part II: Petitioner Interviews**  OCS will conduct petitioner interviews. This will be scheduled within a sufficient timeframe to allow for timely submission of a staff report to the BOE within the legal limits of the Charter Law. The interview/s will be facilitated by the OCS staff and will be comprised primarily of Office of Charter Schools staff and may include additional members of a review team.  The interviews will require the participation of the lead petitioners, all identified school administrators, and the entire governing board, if possible. All participants will be subject to questions during the interview process.  Questions during the interviews will specifically seek to develop a clearer understanding of the will, skill, and capacity of the lead petitioners and their governing board to effectively and successfully implement their proposed charter school. Background into the design process, qualifications of the proposed school leadership and key staff, design elements, and existing, as well as developing, structures, systems and curriculum will be inquired upon to assist in informing the petition review process. |
| **Office of Charter Schools Staff Recommendation** | The staff of the OCS will make a formal recommendation based on the outcome of the evaluation process and the petitioner interviews. This staff report and recommendation will be made to the BOE of the District with respect to approval or denial of the charter petition. |
| **Board of Education Decision** | The Board of Education votes to approve or deny the charter petition.  An appeal of the decision by the BOE is permitted pursuant to applicable laws, should a charter petition be denied. |

# PETITION APPLICATION

## Executive Summary & Overview

All petitions must include a concise executive summary that includes a clear and compelling mission statement, vision statement, a defined educational philosophy, and an organizational team description. Provide a brief overview of your school by answering the following:

|  |  |
| --- | --- |
| Name of Proposed Charter School |  |
| Grade Configuration |  |
| Model or Focus (e.g., Blended Learning, Dual Language, etc.) |  |
| Proposed Region and/or Neighborhood |  |
| Primary Contact  (name, email, mobile phone) |  |
| Board Chair  (name, email, mobile phone) |  |
| Affiliated Charter Management Organization (if applicable) |  |

**Charter School Executive Summary Narrative:** Address the following questions briefly in a narrative format. Please use the outline numbers and headers provided below; do not include the question prompt in your response.

* 1. What is the mission and vision of the school? Provide mission and vision statements.
  2. Provide a brief overview of the education program of the proposed school. Please limit to one paragraph.

**Enrollment Projections:** Delete unnecessary rows and/or provide additional columns if you will not reach full enrollment by year five. Project your student headcount (not your funded FTEs) and specify corresponding calendar years for each school year.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| GRADE | 20\_\_ - 20\_\_ | 20\_\_- 20\_\_ | 20\_\_ - 20\_\_ | 20\_\_ - 20\_\_ | 20\_\_ - 20\_\_ |
| ECE |  |  |  |  |  |
| K |  |  |  |  |  |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |
| 6 |  |  |  |  |  |
| 7 |  |  |  |  |  |
| 8 |  |  |  |  |  |
| 9 |  |  |  |  |  |
| 10 |  |  |  |  |  |
| 11 |  |  |  |  |  |
| 12 |  |  |  |  |  |
| Total # students |  |  |  |  |  |

**Student Demographics:** Provide your estimated student demographics below.

|  |  |  |  |
| --- | --- | --- | --- |
|  | FRL % | SPED % | EL % |
| Projected Demographics |  |  |  |

**Founding Board of Directors Membership:** For each current Board member, complete the info below.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Current Professional Title and Organization | Board Role | Focus/Expertise |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Summary Budget:** Complete the following table to summarize the budget that has been supplied in this application.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| School Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
| Number of Students |  |  |  |  |  |
| Per Pupil Revenue |  |  |  |  |  |
| State & Federal Grant Funds |  |  |  |  |  |
| Private Grants / Foundation Revenue / Gifts & Contributions |  |  |  |  |  |
| Other Sources |  |  |  |  |  |
| Total Revenue |  |  |  |  |  |
| Instructional Salaries & Benefits |  |  |  |  |  |
| Instructional Services / Supplies |  |  |  |  |  |
| Other Instructional Expenses |  |  |  |  |  |
| Total Instructional Expenditures |  |  |  |  |  |
| Supporting Services Salaries & Benefits |  |  |  |  |  |
| Purchased Property Services |  |  |  |  |  |
| Other Supporting Services Expenses |  |  |  |  |  |
| Total Supporting Services Expenditures |  |  |  |  |  |
| Total Expenses |  |  |  |  |  |
| NET INCOME |  |  |  |  |  |
| For any grants or private funds identified above, indicate whether the funding has already been secured and/or any plans to secure future funding. | | | | | |

## Element 1: Educational Program

***“A description of the educational program of the school, designed, among other things, to identify those whom the school is attempting to educate, what it means to be an “educated person” in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learners.” Ed. Code §47605(b)(5)(A)(i).***

***“A description, for the charter school, of annual goals, for all pupils and for each subgroup of pupils identified pursuant to Section 52052, to be achieved in the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, or the nature of the program operated, by the charter school, and specific annual actions to achieve those goals. A charter petition may identify additional school priorities, the goals for the school priorities, and the specific annual actions to achieve those goals.” Ed. Code § 47605(b)(5)(A)(ii).***

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

### A. Target Population & Community Need

1. Identify and describe the proposed charter school’s target student population. Address:

* Grade levels to be served
* Specific student educational interests, backgrounds, or challenges
* Other relevant characteristics of the targeted student population
* Enrollment: Paste in the **Enrollment Projections Table** from your Executive Summary that shows your forecasted enrollment growth over time. What is your maximum total student enrollment? In what year will your school reach that maximum?
* Student Demographics: Paste in the projected **Student Demographics Table** from your Executive Summary.

1. Describe the relevant characteristics and unmet educational needs of the community where the proposed charter public school will be located and fill out the **Surrounding Schools Demographic & Performance Data (see Appendix F).** Discuss the data pertaining to the schools in the surrounding area and its implications regarding community need for this proposed charter school. Include any objective market research, surveys, and/or other measures and indicators of local demand for the proposed educational program.
2. Explain how the proposed charter school will meet the needs of the community.
3. Address how this school will serve the intent of the Charter Schools Act as well as the District’s mission, vision, and strategic goal in a concise statement (250 words or fewer)
4. Describe the role that parents/guardians and community members have played thus far in developing, or providing input into, the proposed school and the outreach that you have conducted to engage prospective parents, teachers and pupils in the region you are proposing to serve.
5. Describe how community feedback impacted the contents of your charter petition.
6. Provide evidence of support for the proposed school among prospective parents, teachers, and pupils, or any combination thereof. In addition to fulfilling the **Meaningfully Interested Signatures Forms (see Appendix J) requirement, additional** evidence of support may include letters of support, surveys of prospective stakeholders, and/or sign-in sheets from community meetings. Also include evidence of support from any community partners with which the school will work, especially in cases where those partnerships affect budgetary assumptions.
7. How are community members represented on your Board and/or in your founding team?

### B. Philosophy & Approach to Instruction

1. Provide clear, concise school vision and mission statements that match the needs of the targeted population and are aligned with the proposed educational program.

*Note: The vision statement should provide the entire school community, as well as external stakeholders, with a clear picture of what the school aims to achieve. The vision and mission statements provide the foundation for the entire school program and operational plan. Accordingly, the rest of the school petition should fully align with and support the stated vision and mission.*

2. Describe and present evidence that the proposed **instructional methods/strategies** are research- based and have delivered or will deliver rigorous, engaging and effective instruction for the targeted student population. If evidence of effectiveness in other schools serving similar populations is not available, explain why the proposed **instructional methods/strategies** are likely to succeed with your targeted population.

### C. Instructional Design

1. Describe the overall curricular and instructional design and structure of the proposed educational program.
2. **Research Basis.** Present evidence that the proposed **curriculum** is research-based and has delivered or will deliver rigorous, engaging and effective instruction for the targeted student population. If evidence of effectiveness in other schools serving similar populations is not available, explain why the proposed **curriculum** is likely to succeed with your targeted population.
3. Describe the charter school’s curriculum and how it will support implementation and ensure student mastery of the CA Common Core State Standards (CCSS) and other state content standards. (Do not insert California Common Core State Standards (CA CCSS) and/or other state/national content standards within the petition; they may be incorporated by citation/reference.)

Identify and describe:

* Key features and components of the school’s educational program by subject area, including, but not limited to, the following subject areas:
* English Language Arts
* English Language Development/English as a Second Language
* Mathematics
* History-Social Studies
* Science
* Visual and Performing Arts
* Health and Physical Education
* World Languages (secondary schools)
* Electives and other courses/areas of study required for graduation/A-G requirements (secondary schools)

NOTE: For each specific subject or course, identify (label) whether it is “core and/or college preparatory” or “elective”.

* Innovative curricular components of the proposed educational program
* Intervention and enrichment programs
* Curricular and instructional materials, e.g. textbooks and computer-based resources, to be used in each subject area/course/program/grade level

4. **Timeline of Curriculum Development (if the curriculum is not yet fully developed):** Provide a timeline outlining the process and benchmarks for curriculum development, including alignment of curricular materials to California Academic Standards/Common Core State Standards, the person/people responsible for developing the curriculum, teacher training and evidence that this approach will result in increased academic performance for students.

1. Describe how the instructional program will provide and support student development of technology-related skills and student use of technology. Explain how the school will ensure that students will be prepared to take computer-based state standardized assessments.
2. **For proposed secondary schools (departmentalized middle schools and high schools)**: Provide a comprehensive course list or table that shows all course offerings for all grades to be served. For proposed high schools: Identify which courses will meet A-G and graduation requirements. **See the partial sample template below**:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *Subject Area* | *9th Grade* | | *10th Grade* | | *11th Grade* | | *12th Grade* | |
| *1st Sem.* | *2nd Sem.* | *1st Sem.* | *2nd Sem.* | *1st Sem.* | *2nd Sem.* | *1st Sem.* | *2nd Sem.* |
| *English Language Arts* | *[Enter title(s) of specific course(s) to be offered]* |  |  |  |  |  |  |  |
| *Mathematics* |  |  |  |  |  |  |  |  |
| *History-Social Science* |  |  |  |  |  |  |  |  |

1. **For proposed high schools:** Describe the school’s specific graduation requirements, including the number/type of units required. Explain how the school program and course schedule will enable all students to meet graduation and A-G requirements within four years. Address:

* How the school will ensure it provides sufficient credit recovery opportunities and support
* How the school will ensure that transfer students can meet graduation and college entrance requirements

1. **For proposed high schools**: Describe the school’s plan and timeline for obtaining Western Association of Schools and Colleges (WASC) accreditation. Explain how the school’s plan will ensure WASC accreditation prior to graduating its first class of seniors and all subsequent graduating classes.
2. **For proposed high schools**[[1]](#footnote-1): Describe how the charter school will inform parents, including parents with limited English, about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements. Address the manner in which the school will inform parents how and when the school’s course offerings could preclude a student from meeting graduation and/or college entrance requirements if they transfer into or out of the school.
3. **For proposed schools with International Baccalaureate** (or any other complex instructional framework that must be phased in over time)**:** Describe the school’s plan and timeline for implementing the various phases or components of the instructional program.
4. **For proposed elementary schools with Transitional Kindergarten:** Include a description of the school’s Transitional Kindergarten program.
5. **For proposed schools offering summer school**: Describe the summer school program you are proposing. How many students are expected to attend summer school, and how will they be selected for participation? How many hours and weeks of summer school will you provide, and how will it be funded? What specific student needs will the summer school address?

**Academic Calendar & Schedules**

1. Provide an academic calendar that specifically identifies all instructional days, and indicates whether they are regular, early dismissal/shortened, or minimum schedule days. The calendar also must show holidays and breaks.
2. Provide a comprehensive set of sample daily schedules (regular, early dismissal, minimum day) for each grade level to be served. (If more than one grade level will share an identical schedule, e.g. 1st and 2nd grade, the samples may be consolidated.) Each schedule must show both the subjects to be taught during the various periods of the day as well as subtotals and totals of daily instructional minutes. If the school’s instructional design or model uses block scheduling, include multiple days of schedules as necessary to show the complete block model.
3. Complete the “**Instructional Days and Minutes Calculator”** **(see Appendix G).**

***Note: Ensure that all calendars and schedules, including the Instructional Days and Minutes calculator, are internally consistent and accurately represent the described program.***

**Staffing & Professional Development**

1. Describe how the school will recruit teachers who are qualified to deliver the proposed educational program, including any innovative components of the program.
2. Describe how the school will provide ongoing professional development to ensure that teachers have the capacity to deliver the educational program. Include a professional development plan, specifying a list of topics, for the first year of the charter term.

### D. School Culture

1. Describe the planned cultural values for the school and how this culture will promote a positive academic environment and reinforce student intellectual and social development.
2. Explain the systems, practices, and traditions that the school leader and staff will implement to foster this culture for students, teachers, administrators, and parents, starting from the first day of school. *(Do not include your discipline policy here. You will be asked to describe your discipline policy in a later section).*
3. Describe the extracurricular activities or programming the school will offer. What are the activities, how often they will occur, who will manage or oversee the activities and how will they be funded?

### E. Student Recruitment & Enrollment

1. Describe your plan to recruit students in your pre-opening year, including the strategies, activities, events, responsible parties and benchmarks that will demonstrate suitable progress over time.
2. Outline your planned admission process, including specifics around any admission preferences for students, timelines, lottery procedures and policies around waiting lists.
3. How will you specifically reach out to families in poverty, academically low-achieving students, students with disabilities, linguistically diverse families and other youth at risk of academic failure?
4. What is your target re-enrollment rate for each year?
5. Describe the ongoing student recruitment work that you will do once your school has opened. In what ways will it be different than your pre-opening year, in terms of the strategies, activities, events, persons responsible and benchmarks?

### F. Student Engagement & Satisfaction

1. Describe your goal for student attendance, and explain how you will ensure high rates of student attendance (including tardiness and truancy). Who will be responsible for collecting and monitoring attendance data?

2. What will you do in the event that you do not reach your attendance goals? How will you monitor and address chronic absences?

1. **For proposed high schools**: Describe your plan for drop-out recovery, and persistence plans for students at-risk of dropping out.

### G. Community School: Ongoing Family Involvement & Satisfaction

1. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships. *(Do not describe family involvement in governance and decision-making here. You will be asked to describe this in a later section.)*
2. Describe how you will engage families in the school’s culture?

### H. Special Populations: Identification, Remediation, & Acceleration

**Special Education**

1. Explain how the school will use bodies of evidence to identify students with disabilities and special needs. Which staff will be responsible for this identification? What will be the process to identify students? How will the school avoid misidentification?

2. **Professional Development:** How and when will the school provide school wide professional development to special education and general education teachers to serve the needs of special needs students?

1. **SELPA Membership:** In what SELPA do you plan to participate in?

**Response to Intervention**

1. Describe 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 and curriculum to support students in Tiers I, II, and III. Address both academic and behavioral intervention.
2. What specific interventions will be employed to help close achievement gaps?

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

1. Explain how the school will identify gifted/talented and academically advanced students. What criteria will be used to determine exceptional ability or potential? Who will be accountable for identifying these students?
2. Describe the research-based instructional programs and strategies the school will use to appropriately address the educational needs of gifted/talented and academically advanced students. Will the programs require additional instructional materials? If so, describe them.

### I. Special Populations: English Learners

1. What is your philosophy and approach to language instruction? What are the components of this approach? What is the research base?
2. How will you 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? How will you structure English Language Development? What curriculum and instructional resources will you use?
3. What systems of professional development and collaboration will you put in place to support teachers to meet the needs of ELs?
4. How will you design an instructional schedule that addresses the needs of your diverse language learners?
5. **For proposed high schools:** How will you ensure that ELs, including newcomers, receive the required A-G courses to keep them on track to graduation?
6. **Assessment and Placement:** How will you assess the language and literacy needs of your ELs? What assessments will you use? How often will you assess students for progress? What will you do with the results? For ELs who are not demonstrating adequate progress, what specialized instruction or courses will you offer to accelerate language, literacy and academic skills for these students? How will you engage families in understanding how you are addressing their child's needs?
7. **Student Services and Support:** How will you invest in creating Full Service Community School resources specifically geared toward the needs and challenges of newcomer/EL students? What programs and services will you offer, and what community partners will you leverage in order to meet EL students socio-emotional and mental health needs? How will you facilitate the integration of ELs in to the fabric of the greater school community? What will you do to ensure non-English speaking parents are connected to the school, able to understand written material from the school, communicate with school staff and participate in parent-teacher meetings?

## Elements 2: Measurable Pupil Outcomes & Element 3: Method to Measure Progress

***“The measurable pupil outcomes identified for use by the charter school. "Pupil outcomes," for purposes of this part, means the extent to which all pupils of the school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the school's educational program. Pupil outcomes shall include outcomes that address increases in pupil academic achievement both schoolwide and for all groups of pupils served by the charter school, as that term is defined in subparagraph (B) of paragraph (3) of subdivision (a) of Section 47607. The pupil outcomes shall align with the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, or the nature of the program operated, by the charter school.” Ed. Code §47605(b)(5)(B).***

***“The method by which pupil progress in meeting those pupil outcomes is to be measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card.”Ed. Code §47605(b)(5)(C).***

NOTE: Elements 2 and 3 have been combined into one section in order to support petition clarity, coherence, and consistency. In this unified section, address both summative and formative assessments.

1. **Collective Measureable Pupil Outcomes:** OUSD-authorized charter schools are expected to use the **Collective Measureable Pupil Outcomes (MPOs)** developed by charter leaders and the Office of Charter Schools. Download the Collective MPO Templates available on the OUSD website (ousdcharters.net) and paste the completed templates into this section.

2. **State Priorities under LCFF:** In addition to the Collective MPOs, petitions must include the chart **"State Priorities Under LCFF" (see Appendix H)** outlining the requirements of Education Code § 47605(b)(5)(A)(ii), including:

* Description of the school’s annual goals, for all pupils (i.e. schoolwide) and for each subgroup of pupils identified pursuant to Education Code § 52052, for each of the eight (8) state priorities identified in Education Code § 52060(d).
* Description of the specific annual actions the school will take to achieve each of the identified annual goals.

3. **Formative Assessments:** Describe how the school will monitor and measure student progress toward mastery of state standards and the other goals identified above. Address:

* Specific assessment tools (e.g. periodic assessments and screening and diagnostic tools), including how they are appropriate and sufficient to measure progress towards the specific goals targeted
* Frequency of assessment
* Performance expectations

4. **Data Analysis and Reporting:** Outline the school’s plan for collecting, analyzing, using, and reporting academic performance and other data. Address:

* The type(s) of data the school will use
* The role and use of data to inform curriculum, instruction, and professional development
* The role and use of data to inform stakeholders of school performance

**5. Grading, Progress Reporting, and Promotion/Retention** Describe the school’s grading and progress reporting systems. Address:

* Grading policy
* Type and frequency of progress reporting
* Promotion/retention policies and procedures

## Element 4: Governance Structure

***“The governance structure of the school, including, but not limited to, the process to be followed by the school to ensure parental involvement.”Ed. Code §47605(b)(5)(D).***

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

### A. Governance Structure

1. Describe the school’s governance structure. Include:

* Organizational chart that shows the supervisorial, advisory, and other relationships among and between the school’s governing board, committees, key personnel, and/or parent/stakeholder councils, organizations or positions
* Description of the major roles and responsibilities, within the governance structure, of the school’s governing board and executive-level employees (e.g. CEO, CAO, CFO, Executive Director, and/or Director/Principal)

1. Explain how the composition of the school’s governing board will contribute to effective school governance.
2. Outline the criteria and process for selecting governing board members. Address:

* Length/rotation of service terms
* Process and potential considerations for determining a need to select/add board member
* Board member qualifications
* Selection criteria and process

**Governance Procedures and Operations**

1. Describe the meeting requirements and procedures of the governing board and its committees, if any. Include:

* Location and frequency of governing board and committee meetings
* Process and timeline for setting annual calendar of governing board and committee meetings
* Location(s) for posting governing board and committee meeting agendas
* Specific procedures that will ensure compliance with key Brown Act requirements

1. Provide the governing board's by-laws and describe the decision-making procedures. Address:

* Quorum requirements
* Board action (voting) requirements
* Abstention and teleconference participation

**Stakeholder Involvement & Dispute Resolution**

1. Describe the school’s stakeholder involvement plan and process. Address:

* The role of families and staff in the governance of the school
* The process by which the school will consult with parents and teachers regarding the school’s educational program
* The composition, selection, and operating procedures for family organizations or committee, if any

2. Please include your complaint and dispute resolution process and address:

* How the complaint policies and procedures will be communicated to family members and the community
* Where and how complaint forms will be made available
* Responsible parties for receiving and responding/escalating complaints
* How the governing board will be involved in the complaint/dispute resolution process

Note: Ensure that this section meets LCFF stakeholder involvement requirements and guidelines.

**Legal Structure**

1. Provide evidence of an adequate and appropriate legal structure for the school by including each of the following:

* Documentation of proper legal structure (Articles of Incorporation stamped by the Office of the Secretary of State and corporate bylaws)
* Evidence of 501(c)3 Non-Profit Corporation status

2. Provide evidence that 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.

### B. Operating Plans & Procedures

1. Provide a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals.

2. Complete the table below outlining your school staffing model and rollout plan. Modify the table, as needed, including adjusting or adding functions and titles, to reflect variations in school models.

**School Staffing Model and Rollout**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Year | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 |
| Principal |  |  |  |  |  |  |
| Assistant Principal |  |  |  |  |  |  |
| Add’l School Leadership Position 1 [specify] |  |  |  |  |  |  |
| Add’l School Leadership Position 2 [specify] |  |  |  |  |  |  |
| Add’l School Leadership Position 3 [specify] |  |  |  |  |  |  |
| Classroom Teachers (Core Subjects) |  |  |  |  |  |  |
| Classroom Teachers (Electives) |  |  |  |  |  |  |
| Student Support Position 1  [specify: i.e., Social Worker] |  |  |  |  |  |  |
| Student Support Position 2 [specify] |  |  |  |  |  |  |
| Specialized School Staff 1 [specify] |  |  |  |  |  |  |
| Specialized School Staff 2 [specify] |  |  |  |  |  |  |
| Teacher Aides and Assistants |  |  |  |  |  |  |
| School Operations Support Staff |  |  |  |  |  |  |
| Total FTEs |  |  |  |  |  |  |

2. Please describe how the school intends to meet transportation needs for field trips and athletic events. If the school will provide transportation to school each day, describe the transportation arrangements for prospective students.

3. Describe how the school will ensure students' nutritional needs are met during the school day. List any vendors you intend to use.

4. Provide 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, automobile, and other.

### C. Budget/Financial Plan

1. Submit the following budget documents:

* **Multi-Year Budget Projection Excel Sheet (available at** [**www.ousdcharters.net/new-petition-application.html**](file:///C:\Users\leslie.jimenez\Downloads\www.ousdcharters.net\new-petition-application.html)**)** which includes 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**, designed to support budget projections as the state transitions to the Local Control Funding Formula **(see** [**http://fcmat.org/local-control-funding-formula- %20resources/**](http://fcmat.org/local-control-funding-formula-%20resources/) **for latest version).**
* **Three-Year Cash Flows Excel Sheet** **(available at** [**www.ousdcharters.net/new-petition-application.html**](file:///C:\Users\leslie.jimenez\Downloads\www.ousdcharters.net\new-petition-application.html)**)**

2. Budget Narrative: Present a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on the following variable income:

a. Per-Pupil Revenue.

b. Anticipated Funding Sources. Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include evidence of commitment for any funds on which the school’s core operation depends.

c. Discuss the school’s contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

d. Year 1 cash flow contingency, in the event that revenue projections are not met in advance of opening.

3. Provide a compensation plan based on sound budget assumptions that reflects understanding of the prevailing market and supports the proposed educational program.

4. Describe 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. Describe any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services.

## Element 5: Employee Qualifications

***“The qualifications to be met by individuals to be employed by the school.”Ed. Code §47605(b)(5)(E).***

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

**Operations Capacity**

1. Describe 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

2. Describe 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. Provide 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. For each position, provide a job description and describe the minimum and desirable qualifications.

## Element 6: Health and Safety Procedures

***“The procedures that the school will follow to ensure the health and safety of pupils and staff. These procedures shall include the requirement that each employee of the school furnish the school with a criminal record summary as described in Section 44237.” Ed. Code §47605(b)(5)(F).***

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

1. Describe 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. Provide 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.

## Element 7: Means to Achieve Racial and Ethnic Balance

***“The means by which the school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.” Ed. Code §47605(b)(5)(G).***

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

1. Fill out the **District & Surrounding School Racial & Ethnic Demographics Chart (see Appendix I**) by researching current demographic data in the school's proposed region, including the prevalence of ELs, foster care youth, special education students, and students in various racial and socioeconomic status groups.

2. How will school leaders ensure that the school's enrollment reflects the demographics of Oakland and/or the region of the school's proposed location? Describe 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.

## Element 8: Admission Requirements

***“Admission requirements, if applicable.” Ed. Code §47605(b)(5)(H).***

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

**Admission Requirements**

1. Describe the specific requirements for admission and/or enrollment in the proposed school.

**Lottery Preferences and Procedures**

1. Identify any admission preferences. Include the rationale for such preferences.
2. Describe the manner in which the charter school will conduct a public random drawing in the event that the number of students who wish to attend the school exceeds the school’s capacity. Describe:

* Open enrollment period(s) or timeline, and related enrollment procedures
* Method(s) that the school will use to communicate to all interested parties the timeline, rules, and procedures to be followed during the open enrollment and lottery processes
* Method that the school will use to ensure lottery procedures are fairly executed and that interested parties may attend and observe
* Date, time, and location for the lottery each year, if needed
* Procedures that the school will follow to determine waiting list priorities based upon lottery results and to enroll students from the waiting list
* Means by which the school will notify parents/guardians of students who have been offered a seat as a result of the lottery or from the waiting list following a lottery, and the procedures and timelines under which parents/guardians must respond in order to secure admission
* Method for documenting the fair execution of lottery and waitlist procedures

## Element 9: Annual Financial Audits

***“The manner in which annual, independent financial audits shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.” Ed. Code §47605(b)(5)(I).***

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.

## Element 10: Suspension & Expulsion Procedures

***“The procedures by which pupils can be suspended or expelled.” Ed. Code §47605(b)(5)(J).***

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

1. What will be the key elements of the school discipline policy, and how will it support a positive school culture? Address:

* School-wide positive behavior support and intervention and restorative practices
* Alternatives to suspension, especially for behavior issues related to low academic achievement and attendance-related concerns
* Professional development, including training in preventive strategies

2. How will the discipline policy be implemented in classrooms and what teaching strategies will be used to ensure students are on task and focused on learning?

3. How will you ensure that minority students and students with disabilities are not disproportionately represented in disciplinary procedures such as suspensions and expulsions? How will you measure or track this data?

4. Outline how detailed policies and procedures regarding suspension and expulsion will be developed and periodically reviewed, including, but not limited to, periodic review (as necessary) and modification of the lists of offenses for which students are subject to suspension or expulsion.

**Grounds for Suspension and Expulsion**

1. Identify and describe all offenses for which students must be suspended (i.e. non-discretionary suspension) and all offenses for which a student may be suspended (i.e. discretionary suspension). If this list of offenses is not aligned with the list of offenses set forth in the Education Code for other public schools, explain the rationale for the difference(s) and how the list provides adequate safety for students, staff, and visitors to the school and serves the best interests of students. Identify the scope of the school’s disciplinary jurisdiction (e.g. location, day/time, activity).

2. Identify and describe all offenses for which students must be recommended for expulsion (i.e. mandatory recommendation for expulsion) and all offenses for which a student may be recommended for expulsion (i.e. discretionary recommendation for expulsion). If this list of offenses is not aligned with the list of offenses set forth in the Education Code for other public schools, explain the rationale for the difference(s) and how the list provides adequate safety for students, staff, and visitors to the school and serves the best interests of students. Identify the scope of the school’s disciplinary jurisdiction (e.g. location, day/time, activity).

**Suspension Procedures**

1. Describe the school’s specific rules and procedures for student suspension, including:

* What position(s) is/are authorized to suspend students
* 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 suspension
* How a parent/student may appeal a suspension decision

1. Identify 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. Describe how the school will provide the student with access to education during the term of the suspension.
3. Describe the specific rules and procedures for suspension pending the outcome of an expulsion process, including the maximum number of days a suspension can be extended and the school’s interim placement procedures.
4. Describe how the school will accommodate the rights of students with disabilities with respect to suspension and expulsion.

**Expulsion Procedures**

1. Describe the school’s specific rules and procedures for student expulsion. Address:

* 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. Describe the school’s policies and procedures regarding rehabilitation, reinstatement, and readmission.

## Element 11: Employee Retirement Systems

***“The manner by which staff members of the charter schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security.” Ed. Code §47605(b)(5)(K).***

A “reasonably comprehensive” petition will include 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.

## Element 12: Public School Attendance Alternatives

***“The public school attendance alternatives for pupils residing within the school district who choose not to attend charter schools.” Ed. Code §47605(b)(5)(L).***

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.

## Element 13: Rights of District Employees

***“A description of the rights of any employee of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school.” Ed. Code §47605(b)(5)(M).***

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

## Element 14: Mandatory Dispute Resolution

***“The procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter.”Ed. Code §47605(b)(5)(N).***

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]

## Element 15: Charter School Closure Procedures

***“A description of the procedures to be used if the charter school closes. The procedures shall ensure a final audit of the school to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets and for the maintenance and transfer of pupil records.” Ed. Code §47605(b)(5)(P).***

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

## Addendum for Existing Providers (if applicable)

*This section is required of all applicants seeking approval for multiple schools, replication of existing schools or school models, and governance of multiple schools by a single board of directors. If an applicant believes that a particular question in this section is not applicable to their proposal, the applicant should explain why the question does not apply.*

**A. Curriculum and Instructional Design Supplement**

1. Explain the organization’s approach to replicating and implementing the school model, including curriculum and instructional design among multiple schools.

2. Describe any key educational features that will *differ* from the operator’s or management provider’s existing schools or schools proposed for replication, not already discussed above. Explain the rationale for the variation in approach and any new resources the variation would require.

**B. Network Vision, Growth Plan, & Capacity**

1. Describe the organization or network strategic vision, desired impact, and five-year growth plan for developing new schools within the local community, state and region, including other states if applicable. Include the following information, regardless of school location: proposed years of opening; number and types of schools (divisions, grade levels served); any pending applications; all currently targeted markets/communities and criteria for selecting them; and projected enrollments.
2. If the existing portfolio or growth plan includes schools in other districts, explain specifically how OUSD fits into the overall growth plan.
3. Provide evidence of organizational capacity to replicate and operate high-quality schools in OUSD and elsewhere in accordance with the overall growth plan. Include the organization’s annual reports for the last two years and any current business plan for the organization or network. Outline specific timelines for building or deploying organizational capacity to support the proposed schools.
4. Discuss the results of past replication efforts and lessons learned – including particular challenges or troubles encountered; how you have addressed them; and how you will avoid or minimize such challenges for the proposed schools.
5. Discuss the greatest anticipated risks and challenges to achieving the organization’s desired outcomes in OUSD over the next five years and how the organization will meet these challenges and mitigate risks.

**Network Management**

1. Identify the organization’s leadership team and their specific roles and responsibilities.

2. Explain any shared or centralized support services the network organization will provide to schools in OUSD. Describe the structure, specific services to be provided, the cost of those services, how costs will be allocated among schools, and specific service goals. How will the organization measure successful delivery of these services? (In the case of a governing board proposing to contract with a management organization, service goals should be outlined in the term sheet and draft contract.)

3. Using the table below, summarize school- and organization-level decision-making responsibilities as they relate to key functions, including curriculum, professional development, culture, staffing, etc.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  | | --- | --- | --- | | **Function** | **Network/Management Organization** **Decision-Making** | **School Decision-Making** | | Performance Goals |  |  | | Curriculum |  |  | | Professional Development |  |  | | Data Management and Interim Assessments |  |  | | Promotion Criteria |  |  | | Culture |  |  | | Budgeting, Finance, and Accounting |  |  | | Student Recruitment |  |  | | School Staff Recruitment and Hiring |  |  | | H/R Services (payroll, benefits, etc) |  |  | | Development/ Fundraising |  |  | | Community Relations |  |  | | I/T |  |  | | Facilities Management |  |  | | Vendor Management / Procurement |  |  | | Other operational services, if applicable |  |  | |
|  |

4. Provide the following organization charts:

* Year 1 network as a whole (including both network management and schools within the network)
* Year 3 network as a whole
* Year 5 network as a whole

The organization charts should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the schools. The school-level organization charts should likewise present clear lines of authority and reporting within the school. If the school intends to contract with a charter management organization or other education management provider, clearly show the provider's role in the organizational structure of the school. Explain how the relationship between the governing board and school administration will be managed.

**Network Governance & Legal Status**

1. Describe the governance structure at both the network and individual school levels and the plan for satisfying all applicable statutory and authorizer requirements for composition of charter school governing boards. Explain 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. If there will be both a network-level board and boards at each school, describe the organizational relationship between the boards, the legal status of each board, and the scope of authority of each. If each school will have an independent governing board but no network-level board, explain how the network will be governed and how decisions that affect the network as a whole will be made.

2. If the existing board will govern the proposed school(s), discuss the plan to transform that board’s membership, mission and bylaws to support the charter school expansion/replication plan. Describe the plan and timeline for completing the transition and orienting the board to its new duties. If a new board will be formed, describe how and when the new board will be created and what, if anything, its ongoing relationship to the existing non-profit’s board will be.

3. Describe plans for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled? What are the priorities for recruitment of additional board members? What kinds of orientation or training will new board members receive, and what kinds of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation. If there will be a network-level board, identify any board development requirements relative to the organization’s proposed growth and governance needs.

4. Explain how the interests of individual schools will be balanced with network interests and how key stakeholders will be represented.

5. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; and b) the board will evaluate the success of the school and school leader.

**Network Leadership Pipeline**

1. Describe the operator’s current or planned process for sourcing and training potential school leaders for schools opening in subsequent years. Explain how you have developed or plan to establish a pipeline of potential leaders for the network as a whole. If known, identify candidates already in the pipeline for future positions.

**Network-wide Staffing**

1. Complete the following table indicating projected staffing needs for the entire network over the next five years. Include full-time staff and contract support that serve the network 50% or more. Change, add or delete functions and titles as needed to reflect organizational plans.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Year** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| Number of elementary schools |  |  |  |  |  |
| Number of high schools |  |  |  |  |  |
| Number of middle schools |  |  |  |  |  |
| Total schools |  |  |  |  |  |
| Student enrollment |  |  |  |  |  |
| **Management Organization Positions** |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| [specify] |  |  |  |  |  |
| **Total back-office FTEs** |  |  |  |  |  |
| **Elementary School Staff** |  |  |  |  |  |
| Principals |  |  |  |  |  |
| Assistant Principals |  |  |  |  |  |
| Add’l School Leadership Position 1 [specify] |  |  |  |  |  |
| Add’l School Leadership Position 2 [specify] |  |  |  |  |  |
| Add’l School Leadership Position 3 [specify] |  |  |  |  |  |
| Classroom Teachers (Core Subjects) |  |  |  |  |  |
| Classroom Teachers (Electives) |  |  |  |  |  |
| Student Support Position 1 [e.g., Social Worker] |  |  |  |  |  |
| Student Support Position 2 [specify] |  |  |  |  |  |
| Specialized School Staff 1 [specify] |  |  |  |  |  |
| Specialized School Staff 2 [specify] |  |  |  |  |  |
| Teacher Aides and Assistants |  |  |  |  |  |
| School Operations Support Staff |  |  |  |  |  |
| **Total FTEs at elementary schools** |  |  |  |  |  |
| **Middle School Staff** |  |  |  |  |  |
| Principals |  |  |  |  |  |
| Assistant Principals |  |  |  |  |  |
| Add’l School Leadership Position 1 [specify] |  |  |  |  |  |
| Add’l School Leadership Position 2 [specify] |  |  |  |  |  |
| Add’l School Leadership Position 3 [specify] |  |  |  |  |  |
| Classroom Teachers (Core Subjects) |  |  |  |  |  |
| Classroom Teachers (Electives) |  |  |  |  |  |
| Student Support Position 1 [e.g., Social Worker] |  |  |  |  |  |
| Student Support Position 2 [specify] |  |  |  |  |  |
| Specialized School Staff 1 [specify] |  |  |  |  |  |
| Specialized School Staff 2 [specify] |  |  |  |  |  |
| Teacher Aides and Assistants |  |  |  |  |  |
| School Operations Support Staff |  |  |  |  |  |
| **Total FTEs at middle schools** |  |  |  |  |  |
| **High School Staff** |  |  |  |  |  |
| Principals |  |  |  |  |  |
| Assistant Principals |  |  |  |  |  |
| Add’l School Leadership Position 1 [specify] |  |  |  |  |  |
| Add’l School Leadership Position 2 [specify] |  |  |  |  |  |
| Add’l School Leadership Position 3 [specify] |  |  |  |  |  |
| Classroom Teachers (Core Subjects) |  |  |  |  |  |
| Classroom Teachers (Electives) |  |  |  |  |  |
| Student Support Position 1 [e.g., Social Worker] |  |  |  |  |  |
| Student Support Position 2 [specify] |  |  |  |  |  |
| Specialized School Staff 1 [specify] |  |  |  |  |  |
| Specialized School Staff 2 [specify] |  |  |  |  |  |
| Teacher Aides and Assistants |  |  |  |  |  |
| School Operations Support Staff |  |  |  |  |  |
| **Total FTEs at high schools** |  |  |  |  |  |
| **Total network FTEs** |  |  |  |  |  |

**Network Performance Management**

1. Describe the educational and organizational academic goals and targets and what systems will be used to monitor the 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.
2. Describe the organization’s approach to academic underperformance for schools that fall short of student academic achievement expectations or goals at the school-wide, classroom, or individual student level. What actions will you take if the network as a whole fails to meet these goals?
3. Discuss how the organization assesses its readiness to grow and under what circumstances the organization will delay or modify its growth plan.

**C. Performance Evaluation Information**

1. Select one or more of the consistently high-performing schools that the organization operates, and discuss the school’s performance. Be specific about the results on which you base your judgment that the school is high-performing. Include student achievement status, growth, absolute, and comparative academic results, as available.

* Discuss the primary causes to which you attribute the school’s distinctive performance.
* Discuss any notable challenges that the school has overcome in achieving its results.
* Identify any ways in which the school’s success has informed or affected how other schools in the network operate. Explain how the effective practice or structure or strategy was identified and how it was implemented elsewhere in the network.

1. Select one or more of the organization’s lowest-performing schools and discuss the school’s performance. Be specific about the results on which you base your judgment that performance is unsatisfactory. Include student status, growth, absolute, and comparative academic results, as available.

* Describe the primary causes to which you attribute the school’s underperformance.
* Explain the specific strategies that you are employing to improve performance.
* How will you know when performance is satisfactory?
* What are your expectations for satisfactory performance in terms of performance levels and timing?

1. For the organization as a whole and any related business entities, provide the following:

* The last three years of independent financial audit reports and management letters;
* The most recent internal financial statements, including balance sheets and income statements. Be sure that the ESP/CMO level and the overall operations are distinctly represented.

1. List any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated by the organization, and explain what caused these actions.
2. Explain any performance deficiencies or compliance violations that have led to formal authorizer intervention with any school operated by the organization in the last three years, and explain how such deficiencies or violations were resolved.
3. Identify any current or past litigation, including arbitration proceedings, by school, that has involved the organization or any charter schools it operates. If applicable, provide (1) the demand, (2) any response to the demand, and (3) the results of the arbitration or litigation.

# APPENDICES

## Appendix A. Letter of Intent

**If you plan to submit a charter school petition to the Oakland Unified School District, it is recommended to submit the following Letter of Intent to the Office of Charter Schools in advance. This will help the Office of Charter Schools to communicate better and more effectively with petitioner groups. Thank you!**

Name of proposed school

Lead Petitioner

Full mailing address

(city, state, zip)

Daytime telephone number

E-mail address

Proposed Date of Submission \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proposed date of opening

Proposed location of school

Do you plan to request Prop 39 facilities?

Composition of petitioner group (e.g.

parents, teachers, non-profit organization)

Grade levels to be served in year 1

Anticipated enrollment in year 1

Grade levels to be served at full capacity

Anticipated enrollment at full capacity

Target student population

(e.g. at-risk youth)

Brief description of kind of school proposed (e.g. arts-, math-, or science-focused school or use a particular school/curriculum design).

Brief explanation of proposed charter school. In one or two sentences, provide a clear statement that defines the purpose(s) and nature of your school.

Are you planning to work with a charter management organization (CMO) or education management organization (EMO)?

Yes No

If Yes, please circle: CMO / EMO

If Yes, please indicate name of CMO / EMO:

Signature of Lead Petitioner Date

## Appendix B: OUSD’s 5 Pillars of Quality School Development

In the space below, please provide bullet points of aspects of your petition that align with each Pillar.

|  |  |
| --- | --- |
| **OUSD’s 5 Pillars of Quality School Development** | ***Aspects of petition that align to Pillars.***  *(Bulleted format only)* |
| 1.     **Educator Development and Pipelines** –  Successful schools will be led by effective leaders who work collaboratively to develop and nurture a cross-functional leadership team.  The school will help educators develop through effective professional learning and recognize effective educators for their success. |  |
| 2.     **Strong School Culture** –  The school will have a mission, vision, and values that are focused on high academic achievement for students while preparing them for college, career, and community success.  The school will stress the importance of education as well as the social and emotional well-being of students.  This feature must permeate all other components of the school and should include restorative practices as a part of the approach to strengthening culture. |  |
| 3.     **Increased Time on Task** –  Successful schools will intentionally use time to maximize student learning.  Extended school days, weeks, and years are integral components.  Additionally, the school must prioritize providing teachers’ time for planning, collaboration, and professional learning. |  |
| 4.     **Rigorous Academics** –  Effective schools ensure teachers have access to foundational documents and instructional materials needed to help students achieve high growth.  This includes data-driven inquiry cycles that support regularly assessing student progress, analyzing student progress, and re-teaching skills with the expectation that students master standards. |  |
| 5.     **Linked/Personalized Learning** –  Students will be exposed throughout a K-12 program to different educational options that go beyond the “four walls” of the school in effective schools.   This will include bringing relevance to students’ lives and the world of real world of work through the curriculum, allowing students to innovate and create, having them concurrently enrolled in college classes, engaging them in internships, using online learning, and providing students access to career pathways in our secondary schools. |  |

\*Links to **folder** research, tools, and support for the 5 Pillars can be found in the following link:

<http://qualitycommunityschools.weebly.com/proposal-teams-iss.html>

## Appendix C: Certification Statement

Proposed Charter School Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proposed School Location (City)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I hereby certify that the information submitted in this petition is true to the best of my knowledge and belief; that this petition has been or is being sent to the Superintendent of each of the districts from which we intend to draw students; and further I understand that, if awarded a charter, the proposed school shall be open to all students on a space available basis, and shall not discriminate on the basis of race, color, national origin, creed, sex, ethnicity, sexual orientation, mental or physical disability, age, ancestry, athletic performance, special need, proficiency in the English language or a foreign language, or academic achievement. This is a true statement, made under the penalties of perjury.

Signature of

Authorized Person\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_

(Please label the copy that has original signatures.)

Print/Type Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Phone\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Appendix D: Charter School Roster of Key Contacts

Complete the following Roster for the Board of Directors and key administrative leaders and/or partners for the proposed school. Be sure to include titles and roles. ***Separate sheets may be used to ensure all relevant contacts are provided.***

**Name of Schools(s):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Nonprofit**

**Corporation:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Primary Contact**

**Person:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mailing Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Phone:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**NONPROFIT BOARD OF DIRECTORS**

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**NONPROFIT BOARD OF DIRECTORS continued**

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**SCHOOL PERSONNEL**

**Business Manager**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_(may be undetermined at time of submission)\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**OTHER AS APPLICABLE (school management entity, partner)**

Title/Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Title/Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Title/Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## Appendix E: Statement of Assurances

This form or other similar form must be signed by a duly authorized representative of the petitioner group and submitted with the petition. A petition will be considered incomplete if it is not accompanied by the Statement of Assurances or does not otherwise contain these assurances. The most up-to-date version of this form can be found on our website.

As the authorized representative of the applicant group, I hereby certify under the penalties of perjury that the information submitted in this petition for a charter for (name of school) to be located at\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_is true to the best of my knowledge and belief; and further, I certify that, if granted a charter, the school:

1. Will not charge tuition, fees, or other mandatory payments for attendance at the charter school or for participation in programs that are required for students.

2. Will enroll any eligible student who submits a timely and complete application, unless the school receives a greater number of applications than there are spaces for students, in which case a lottery will take place in accordance with California charter laws and regulations.

3. Will be non-sectarian in its curriculum, programs, admissions, policies, governance, employment practices, and all other operations.

4. Will be open to all students, on a space available basis, and shall not discriminate on the basis of the characteristics included in Education Code section 220, including but not limited to race, color, national origin, creed, sex, ethnicity, sexual orientation, mental or physical disability, age, ancestry, athletic performance, special need, proficiency in the English language or a foreign language, or academic achievement.

5. Will not exclude admission based on the student’s or parent’s/guardian’s place of residence, except that a conversion school shall give admission preference to students who reside within the former attendance area of the public school.

6. Will meet all statewide standards and conduct the pupil assessments required pursuant to Education Code Sections 60605 and 60851 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in noncharter public schools.

7. Will comply with all applicable portions of the 2001 reauthorization of the Elementary and Secondary Act (also known as “No Child Left Behind”). (20 U.S.C. § 6319.)

8. Will consult, on a regular basis, with parents, guardians and teachers regarding its educational programs, as required by Education Code section 47605(c)(2).

9. Will offer at least the minimum amount of instructional time at each grade level as required by law, and comply with Title 5, California Code of Regulations, section 11960(b) with respect to the legally required minimum school days.

10. Will comply with the conditions of apportionment set forth in Education Code section 47612(b) that average daily attendance not be generated by a pupil who is not a California resident, and that “a pupil over 19 years of age shall be continuously enrolled in public school and make satisfactory progress towards award of a high school diploma,” to remain eligible for generating charter school apportionments.

11. Will provide to the Office of Charter Schools information regarding the proposed operation and potential effects of the school, including, but not limited to, the facilities to be used by the school, including where the school intends to locate, the manner in which administrative services will be provided, and potential civil liability effects, if any, upon the school and authorizing board.

12. Will adhere to all applicable provisions of federal law relating to students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990.

13. Will comply with the requirement set forth in Education Code section 47605(d)(3) that “[i]f a pupil is expelled or leaves the charter school without graduating or completing the school year for any reason, the charter school shall notify the superintendent of the school district of the pupil's last known address within 30 days, and shall, upon request, provide that school district with a copy of the cumulative record of the pupil, including a transcript of grades or report card, and health information.”

14. Will adhere to all applicable provisions of federal law relating to students who are English language learners, including Title VI of the Civil Rights Act of 1964; the Equal Educational Opportunities Act of 1974; MGL c. 76, §5; and MGL c. 89, 71 § (f) and (I).

15. Will comply with the Family Educational Rights and Privacy Act (20 U.S.C. § 1232g; 34 CFR Part 99 ).

16. Will comply with all other applicable federal and state laws and regulations, including the California Code of Regulations.

17. Will submit an annual report and annual independent audits to the OUSD Office of Charter Schools by all required deadlines.

18. Will maintain written contemporaneous records that document all pupil attendance and make these records available for audit and inspection, as required by Education Code section 47612.5(a)(2).

19. Will submit required enrollment data each March to the OUSD Office of Charter Schools by the required deadline.

20. Will comply with “[a]ll laws establishing minimum age for public school attendance,” as required by Education Code section 47610(c).

21. Will operate in compliance with generally accepted government accounting principles.

22. Will maintain separate accountings of all funds received and disbursed by the school.

23. Will participate in the California State Teachers’ Retirement System and other retirement systems, as applicable.

24. Will obtain, keep current, and make available for inspection all necessary permits, licenses, and certifications related to fire, health and safety within the building(s) and on school property.

25. Will obtain, keep current, and make available for inspection all necessary teacher certifications, permits or other documents as required under EC Section 47605(l).

26. Will at all times maintain all necessary and appropriate insurance coverage.

27. Will submit to the OUSD Office of Charter Schools the names, mailing addresses, and employment and educational histories of proposed new members of the Board of Trustees prior to their service.

28. Will, in the event the Board of Trustees intends to procure substantially all educational services for the charter school through a contract with another person or entity, provide for approval of such contract by the Board of Education in advance of the beginning of the contract period.

29. Will require the Charter School Board to comply with the provisions of the Ralph M. Brown Act (California Government section Code 54950 et seq.)

30. Will comply with the provisions of the California Public Records Act (California Government Code section 6250 et seq.).

31. Will provide financial statements that include a proposed first-year operational budget with start-up costs and anticipated revenues and expenditures necessary to operate the school, including special education; and cash-flow and financial projections for the first three years of operation.

32. Will provide to the Office of Charter Schools a school code of conduct, Board of Trustee bylaws, an enrollment policy, and an approved certificate of building occupancy for each facility in use by the school, according to the schedule set by the Office of Charter Schools but in any event prior to the opening of the school.

33. Will be located within the geographical boundaries of the District in locating its site, or otherwise comply with the requirements in Education Code section 47605 and 47605.1.

34. Will agree 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.

Signature Date

Print Name

## Appendix F: Surrounding Schools Demographic & Performance Data

Please provide all applicable demographic and performance data requested in the table below for both District schools and charter schools located within a two-mile radius of the location of the proposed charter school. When completing the table, please remember to:

1. Identify the specific address used as the center point of the two-mile radius below and include the most current data available.
2. Replace “[School Name]” with applicable schools in the column headers and indicate whether each school is District or Charter Run.
3. Replace “[YEAR]” in the “Demographics” and “SBAC Performance” cells in the first column with the specific school year to which the data pertains (should be the most recent available data).
4. For the “Ethnicity” rows (i.e Ethnicity #1, Ethnicity #2, Ethnicity #3) in the Demographics section, include the three ethnicities which make up the largest percentage of the enrolled students along with the percentage for that ethnicity within each cell (e.g. “Latino 76%”).
5. Cite all source(s) used to complete this table in the “Data Sources” section following the table.

**SURROUNDING SCHOOLS DEMOGRAPHIC AND PERFORMANCE DATA**

**Address: [Insert specific address used as the center point of the two-mile radius]**

| **Data Type** | **Subgroup** | **[School Name]** | **[School Name]** | **[School Name]** | **[School Name]** | **[School Name]** | **[School Name]** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | [District/Charter] | [District/Charter] | [District/Charter] | [District/Charter] | [District/Charter] | [District/Charter] |
| **Demographics**  (% of total enrollment)  **[YEAR]** | Eligible for Free/Reduced Priced Meals (FRPM) |  |  |  |  |  |  |
| English Learners |  |  |  |  |  |  |
| Students with Disabilities/ SPED (if available) |  |  |  |  |  |  |
| Ethnicity #1 |  |  |  |  |  |  |
| Ethnicity #2 |  |  |  |  |  |  |
| Ethnicity #3 |  |  |  |  |  |  |
| **SBAC Performance**  (% of students meeting or exceeding standards)  **[YEAR]** | **ELA** | | | | | | |
| Schoolwide |  |  |  |  |  |  |
| Asian |  |  |  |  |  |  |
| Black/African-American |  |  |  |  |  |  |
| Filipino |  |  |  |  |  |  |
| Hispanic/Latino |  |  |  |  |  |  |
| Native American/ Alaskan Native |  |  |  |  |  |  |
| Native Hawaiian / Pacific Islander |  |  |  |  |  |  |
| White |  |  |  |  |  |  |
| Two or More Races |  |  |  |  |  |  |
| English Learners |  |  |  |  |  |  |
| Students with Disabilities (SPED) |  |  |  |  |  |  |
| Economically Disadvantaged (FRPM) |  |  |  |  |  |  |
| **MATH** | | | | | | |
| Schoolwide |  |  |  |  |  |  |
| Asian |  |  |  |  |  |  |
| Black/African-American |  |  |  |  |  |  |
| Filipino |  |  |  |  |  |  |
| Hispanic/Latino |  |  |  |  |  |  |
| Native American/ Alaskan Native |  |  |  |  |  |  |
| Native Hawaiian / Pacific Islander |  |  |  |  |  |  |
| White |  |  |  |  |  |  |
| Two or More Races |  |  |  |  |  |  |
| English Learners |  |  |  |  |  |  |
| Students with Disabilities (SPED) |  |  |  |  |  |  |
| Economically Disadvantaged (FRPM) |  |  |  |  |  |  |

**Data Sources:** [ENTER DATA SOURCES]

NOTE: Please ensure that this matrix remains portrait-sized in order to honor the state’s request that charter school petitions do not include landscape-oriented pages.

## Appendix G: Instructional Minutes and Days Calculator

In addition to providing a comprehensive set of sample daily schedules (regular, early dismissal, minimum day), complete the following Instructional Minutes and Days Calculator. Ensure that all calendars and schedules, including the Instructional Days and Minutes Calculator, are internally consistent and accurately represent the described program.

An Excel version of this document can be downloaded from the “New Petition Application Forms” section of our website.



## Appendix H: State Priorities Under LCFF

1. **State Priorities under LCFF:** In addition to the Collective MPOs, petitions must include the following chart outlining the requirements of Education Code § 47605(b)(5)(A)(ii), including:

* Description of the school’s annual goals, for all pupils (i.e. schoolwide) and for each subgroup of pupils identified pursuant to Education Code § 52052, for each of the eight (8) state priorities identified in Education Code § 52060(d). Please see the template provided below.
* Description of the specific annual actions the school will take to achieve each of the identified annual goals. Please see template below.

NOTE: **These charter petition provisions must be reflected in and consistent with the school’s Local Control and Accountability Plan (LCAP) and/or updates to be prepared and submitted pursuant to the requirements of AB 97 (Local Control Funding Formula legislation).**

NOTE: The charter petition may identify additional school priorities, the goals for the school priorities, and the specific annual actions to achieve those goals. California Education Code § 47605(b)(5)(A)(ii)

NOTE: The template below includes the measurable outcomes that otherwise would be addressed in Element 2. **A completed State Priorities table provided in this Element will meet the LCFF requirements for Element 2 and can be incorporated into Element 2 by reference.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| TEACHER ASSIGNMENTS AND CREDENTIALING  State Priority #1: Basic Services | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| ACCESS TO INSTRUCTIONAL MATERIALS  State Priority #1: Basic Services | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| FACILITIES MAINTENANCE  State Priority #1: Basic Services | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| IMPLEMENTATION OF STATE CONTENT AND PERFORMANCE STANDARDS  State Priority #2 | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| PARENT INVOLVEMENT  State Priority #3 | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| STATEWIDE ASSESSMENTS  State Priority #4: Student Achievement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| Academic Performance Index (API)  State Priority #4: Student Achievement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| A-G Course/ CTE Course of Study Completion Rate(s) [High School Only]  State Priority #4: Student Achievement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| English Learner Adequate Progress Rate  State Priority #4: Student Achievement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| ENGLISH LEARNER RECLASSIFICATION RATE  State Priority #4: Student Achievement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| AP Examination Passage Rate [High Schools Only]  State Priority #4: Student Achievement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| EAP College Preparedness Rate [High Schools Only]  State Priority #4: Student Achievement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| SCHOOL ATTENDANCE RATE  State Priority #5: Student Engagement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| Chronic Absenteeism Rate  State Priority #5: Student Engagement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| Dropout Rate[Middle and High Schools Only]  State Priority #5: Student Engagement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| Graduation Rate[High Schools Only]  State Priority #5: Student Engagement | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| Student Suspension Rate  State Priority #6: School Climate | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| Student Expulsion Rate  State Priority #6: School Climate | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| [OTHER LOCAL MEASURE(s) OF SCHOOL CLIMATE]  State Priority #6: School Climate | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| BROAD COURSE OF STUDY  State Priority #7 | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |
| [OTHER STUDENT OUTCOMES]  State Priority #8 | | | | | | |
| Annual Goals  (Identify schoolwide and subgroup goals as applicable) | Specific  Annual Actions | Measurable Outcomes  Method for Measuring: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
| 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ | 20\_\_-20\_\_ |
|  |  |  |  |  |  |  |

## Appendix I: District & Surrounding School Racial & Ethnic Demographics

Select a comparison school in the region you propose to serve that is most similar to the proposed charter school and serves similar grade levels, and provide the demographic data below for the comparison school and for Oakland Unified School District overall. Include the most current data available. Cite source(s) of all data and replace each “[YEAR]” in the matrix with the specific school year to which the data pertains.

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **District & Surrounding School Racial & Ethnic Demographics** | | | | | | | | | | | |
|  | Total # of Students  [YEAR] | %  American Indian or Alaska Native | %  Asian | %  Black of African American | %  Filipino | %  Hispanic or Latino | %  Multiple/  No Response | %  Native Hawaiian or Pacific Islander | %  None Reported | %  Two or More Races | %  White |
| Comparison School: |  |  |  |  |  |  |  |  |  |  |  |
| District-wide |  |  |  |  |  |  |  |  |  |  |  |
| *Data Source(s):* |  | | | | | | | | | | |

## Appendix J: Meaningfully Interested Signatures Forms

*Pursuant to Education Code 47605 (a)(1), the petition may be submitted after either of the following conditions is met:*

*(A) The petition is signed by a number of parents or legal guardians of pupils that is equivalent to at least one-half of the number of pupils that the charter school estimates will enroll in the school for its first year of operation.*

*(B) The petition is signed by a number of teachers that is equivalent to at least one-half of the number of teachers that the charter school estimates will be employed at the charter school during its first year of operation.*

Note: If you are providing signatures for parents or legal guardians of pupils, please use the forms and spreadsheet provided below. Prior to printing and providing forms to parents/guardians to complete, update the fields highlighted in yellow. The most up-to-date MS Word version of this form (see sample below) can be downloaded from the “New Petition Application Forms and Documents” section of our website (<https://www.ousdcharters.net/applying-charters.html>).

**Meaningfully Interested Students Signature Form (English Version)**

Dear potential **[Insert name of school]**  parents/guardians:

This form may be used to support the charter school’s request for a new charter petition and must be used to support a request for facilities pursuant to Proposition 39 (California Education Code section 47614). **By submitting this form, you are indicating that you are meaningfully interested in enrolling your child/children in the charter school’s classroom-based program during the 2019-20 school year.** Thank you very much for your support and cooperation!

**Student 1:**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Grade in 2019-20:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Last, First, Middle

**Home Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Street Address, City, State, Zip Code

**Home Phone: (\_\_\_\_\_\_\_\_\_\_\_)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Age of Student : \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**1) Is your child currently enrolled in a charter school? Y/N (circle one) If yes, write the name of the charter school: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2) Resident of Oakland Unified School District? Y/N (circle one)**

**If yes, please list the school within OUSD your child currently or would otherwise attend based on your residence: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Student 2:**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Grade in 2019-20:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Last, First, Middle

**Home Address:\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Street Address, City, State, Zip Code

**Home Phone: (\_\_\_\_\_\_\_\_\_\_\_)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Age of Student : \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**1) Is your child currently enrolled in a charter school? Y/N (circle one) If yes, write the name of the charter school: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2) Resident of Oakland Unified School District? Y/N (circle one)**

**If yes, please list the school within OUSD your child currently or would otherwise attend based on your residence: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Parent/Legal Guardian Information:**

**Parent/Legal Guardian Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Last, First, Middle

**Home Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Street Address, City, State, Zip Code

**Home Phone: (\_\_\_\_\_\_\_\_\_\_)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

By signing below, I am indicating that I am meaningfully interested in enrolling the above named child(ren) in the charter school **[Insert name of school]** for the 2019-20 school year. I understand that signing this form does not guarantee enrollment in **[Insert name of school]**. I further understand that this information will be disclosed to the Oakland Unified School District either to support **[Insert name of school]** in a new charter petition request and/or a request for facilities under Proposition 39, and that **OUSD may contact me directly to verify my response.**

**Signature of Parent/Legal Guardian: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Meaningfully Interested Students Signature Form (Spanish Version)**

**Forma Para La Firma De Los Estudiantes Significativamente Interesados**

Estimados padres/guardianes potenciales de la escuela **[Insert name of school]**:

Este formulario puede ser utilizado para apoyar la escuela chárter en su solicitud para una nueva petición y debe ser utilizado para obtener instalaciones de acuerdo a la Proposición 39 (Código de Educación de California 47614). **Al completar este formulario, usted está indicando que esta significativamente interesado/a en inscribir a su hijo/s en el programa de la escuela chárter durante el año escolar 2019-20.** ¡Muchas gracias por su apoyo y cooperación!

**Estudiante 1:**

**Nombre: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Grado en 2019-20:\_\_\_\_\_\_\_\_\_**

Apellido, Primer Nombre, Segundo Nombre

**Domicilio:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Dirección, Ciudad, Estado, Código Postal

**Teléfono de Casa: (\_\_\_\_\_\_\_\_)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Edad del Estudiante: \_\_\_\_\_\_\_\_ Fecha de Nacimiento: \_\_\_\_\_\_\_\_\_\_\_\_**

**1) ¿Esta su hijo/a actualmente matriculada en una escuela chárter? Sí/No (marque uno)**

**Si contesto sí, por favor escriba el nombre de la escuela chárter: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2) ¿Residente del Distrito Escolar Unificado de Oakland? Sí/No (marque uno)**

**Si contesto sí, por favor identifique la escuela dentro del Distrito Escolar Unificado de Oakland a la cual su hijo/a de otra manera asistiría:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Estudiante 2:**

**Nombre: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Grado en 2019-20:\_\_\_\_\_\_\_\_\_**

Apellido, Primer Nombre, Segundo Nombre

**Domicilio:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Dirección, Ciudad, Estado, Código Postal

**Teléfono de Casa: (\_\_\_\_\_\_\_\_)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Edad del Estudiante: \_\_\_\_\_\_\_\_ Fecha de Nacimiento: \_\_\_\_\_\_\_\_\_\_\_\_**

**1) ¿Esta su hijo/a actualmente matriculada en una escuela chárter? Sí/No (marque uno)**

**Si contesto sí, por favor escriba el nombre de la escuela chárter: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**2) ¿Residente del Distrito Escolar Unificado de Oakland? Sí/No (marque uno)**

**Si contesto sí, por favor identifique la escuela dentro del Distrito Escolar Unificado de Oakland a la cual su hijo/a de otra manera asistiría:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Información del padre/ guardián legal:**

**Nombre del padre/guardián legal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Apellido, Primer Nombre, Segundo Nombre

**Domicilio: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Dirección, Ciudad, Estado, Código Postal

**Teléfono de Casa: (\_\_\_\_\_\_\_\_\_)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Correo Electrónico: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Con mi firma, indico que estoy significativamente interesado/a en inscribir al estudiante(s) mencionado(s) arriba en la escuela chárter **[Insert name of school]** para el año escolar 2019-20. Entiendo que al firmar este formulario no garantiza matriculación en la escuela chárter **[Insert name of school]**. También entiendo que esta información será compartida con el Distrito Escolar Unificado de Oakland para apoyar la solicitud de una nueva petición y/o instalaciones bajo la Proposición 39 de la escuela chárter **[Insert name of school],** y **el Distrito puede contactarme directamente para verificar mi respuesta.**

**Firma del Padre/ Guardián Legal**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Fecha:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Note: Please complete the Meaningfully Interested Signatures Excel Document using the information obtained from the Meaningfully Interested Signatures Form filled out by parents/legal guardians. The most up-to-date Excel version of this chart (see sample below) can be downloaded from the “New Petition Application Forms” section of our website ([www.ousdcharters.net](http://www.ousdcharters.net)).

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| The students listed below are meaningfully interested in attending the charter school in the 2019-20 school year. | | | | | | | | |
| **STUDENTS INFORMATION** | | | | | | | | |
|  | **LAST NAME** | **FIRST NAME** | **MIDDLE INITIAL** | **OUSD HOME SCHOOL**  **(Based on Residence)** | **2019-20 GRADE LEVEL** | **STREET**  **ADDRESS** | **CITY** | **ZIP CODE** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |  |  |
| 7 |  |  |  |  |  |  |  |  |
| 8 |  |  |  |  |  |  |  |  |
| 9 |  |  |  |  |  |  |  |  |
| 10 |  |  |  |  |  |  |  |  |
| 11 |  |  |  |  |  |  |  |  |
| 12 |  |  |  |  |  |  |  |  |
| 13 |  |  |  |  |  |  |  |  |
| 14 |  |  |  |  |  |  |  |  |
| 15 |  |  |  |  |  |  |  |  |
| 16 |  |  |  |  |  |  |  |  |
| 17 |  |  |  |  |  |  |  |  |
| 18 |  |  |  |  |  |  |  |  |
| 19 |  |  |  |  |  |  |  |  |
| 20 |  |  |  |  |  |  |  |  |

## 

## Appendix K: OUSD Due Diligence Questionnaire

Submit a Due Diligence Questionnaire (found on the following page) for each proposed governing board member and proposed site administrator. Individuals must complete the form electronically, print it out, sign, and return it to the lead petitioner. The lead petitioner should then submit all of the questionnaires along with the petition.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Oakland Unified School District**  **Due Diligence Questionnaire** | | | | | |
| **Charter Petition Applicant Information** | | | | | |
| Name of Applicant (First/Middle/Last): | | | | | |
| Other Names Used (i.e. Maiden): | | | | | |
| Date of Birth: | | | | | |
| Current address: | | | | | |
| City: | | State: | | ZIP: | |
| How long at current address? | | | | | |
| Prior Addresses (Past five years): | | | | | |
| **Background Information**  **(Please Attach Separate Sheets if Necessary)** | | | | | |
| Criminal History (Date(s) of Arrest(s) or detentions leading to conviction/ Date(s) of Conviction(s)): | | | | | |
| Education History: | | | | | |
| Employment History: | | | | | |
| All Professional Licenses / Credentials Held: | | | | | |
| Professional Affiliations (Corporate Positions, Board Positions, etc.): | | | | | |
| Fictitious Business Name Affiliations: | | | | | |
| Professional References: | | | | | |
| **Proposed Charter School** | | | | | |
| Charter School name: | | | | | |
| Address (if available): | | | | | |
| City: | | State: | | | ZIP: |
| Legal Entity Behind Charter School (if available): | | | | | |
| Other Charter Schools with which Affiliated (prior and current): | | | | | |
| Location of Other Charter Schools: | | | | | |
| **Authorization to Release Information** | | | | | |
| My signature affirms that all information on this application is true to the best of my knowledge. Further, I authorize all employers,  institutions, government agencies and persons named as references to release information for use in establishing my qualifications and credentials for this position. This authorization:  • Removes all liability from those who provide information and verification in response to any information I have stated in applying on behalf of the above referenced Charter School.  • Releases the Oakland Unified School District and any agent acting on its behalf from any and all liability of whatever nature in requesting or using such information to assess my candidacy on behalf of the above referenced Charter School.  • Is valid during my entire candidacy and during any resulting period of employment or governing board membership with the above-referenced Charter School.  • Is an indication of my knowledge and understanding that the information provided in this application will be used to investigate my background and my knowing and voluntary agreement to the background information being publicly disclosed as part of the charter petition review process.  • Is an indication of my understanding that any reports generated by the Office of Charter Schools will not be confidential and my knowing and voluntary waiver of any such confidentiality. | | | | | |
| **Signature** | | | | | |
|  | | | | | |
| Date: | | Title: | | | |
| **FOR OFFICE USE ONLY** | | | | | |
| Charter School Application Processed by: | | | | | |
| Phone: | Fax: | | E-mail: | | |

## Appendix L: OUSD New Charter School Petition Evaluation Criteria

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 2019-20 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:

|  |  |
| --- | --- |
| **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.

|  |  |  |
| --- | --- | --- |
| **Target Population & Community Need** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
|  |  |  |

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Questions** | |
|  | |

### 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.

|  |  |  |
| --- | --- | --- |
| **Philosophy & Approach to Instruction** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
|  |  |  |

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Questions** | |
|  | |

### 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.

|  |  |  |
| --- | --- | --- |
| **Instructional Design** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
|  |  |  |

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Questions** | |
|  | |

### 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.

|  |  |  |
| --- | --- | --- |
| **School Culture** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
|  |  |  |

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Questions** | |
|  | |

### 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.

|  |  |  |
| --- | --- | --- |
| **Student Recruitment & Enrollment** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
|  |  |  |

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Questions** | |
|  | |

### 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.

|  |  |  |
| --- | --- | --- |
| **Student Engagement & Satisfaction** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
|  |  |  |

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
|  |  |
| **Questions** | |
|  | |

### 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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| **Questions** | |
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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** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths** | **Weaknesses** |
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| **Questions** | |
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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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| **Questions** | |
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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. Describes 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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| **Strengths** | **Weaknesses** |
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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** | | |
| **Meets or Exceeds** | **Partially Meets** | **Does Not Meet** |
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| **Strengths** | **Weaknesses** |
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## ****DOMAIN 5: School Operations and Policies (Elements 5-6, 9, 11-15)****

The Charter Schools Act requires authorizers to evaluate whether the petitioners have presented a “reasonably comprehensive” description of the 15 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** | |
| **Inadequate** | **Reasonably Comprehensive** |
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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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| **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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| **Strengths** | **Weaknesses** |
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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** | | |
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## Appendix M: Exclusive Employer Declaration

**“[Charter School/District]** shall be deemed the exclusive public school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act. (Government Code section 3540 *et seq.*) Charter School shall comply with all applicable requirements of the EERA, and the exclusive employer shall comply with the duties and obligations of the exclusive employer under the EERA. In accordance with the EERA, employees may join and be represented by an organization of their choice for collective bargaining purposes.”

1. *Education Code requires a charter school petition to include,“[i]f the proposed school will serve high school pupils, a description of the manner in which the charter school will inform parents about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements. Courses offered by the charter school that are accredited by the Western Association of Schools and Colleges may be considered transferable and courses approved by the University of California or the California State University as creditable under the "A" to "G" admissions criteria may be considered to meet college entrance requirements.”*

   *Ed. Code § 47605(b)(5)(A)(iii).* [↑](#footnote-ref-1)