



<p>SAN LUIS OBISPO COUNTY OFFICE OF EDUCATION CHARTER SCHOOL PETITION REVIEW MATRIX</p>	<input type="checkbox"/> Initial Petition <input type="checkbox"/> Renewal Petition <input type="checkbox"/> Appeal of District Denial
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Proposed Charter School	Petitioner Contact Information	Denial Information	Petition Review and Presentation Timelines (Office Use Only)																																													
Name of Proposed Charter School: Location(s) of Proposed Charter School:	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 5px;">Name:</td><td style="width: 100px;"></td></tr> <tr><td style="padding: 5px;">Phone:</td><td></td></tr> <tr><td style="padding: 5px;">Address:</td><td></td></tr> <tr><td style="padding: 5px;">Email:</td><td></td></tr> </table>	Name:		Phone:		Address:		Email:		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 5px;">District Denying Petition:</td><td style="width: 100px;"></td></tr> <tr><td style="padding: 5px;">Date of District Board Action:</td><td></td></tr> </table>	District Denying Petition:		Date of District Board Action:		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 5px;">Petition Packet Received by SLOCOE</td><td style="width: 100px;"></td></tr> <tr><td style="padding: 5px;">(Maximum of 30 days from denial)</td><td></td></tr> <tr><td style="padding: 5px;">Date:</td><td></td></tr> </table>	Petition Packet Received by SLOCOE		(Maximum of 30 days from denial)		Date:		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 5px;">Board Receipt of Complete Petition Packet</td><td style="width: 100px;"></td></tr> <tr><td style="padding: 5px;">(At Regular Board Meeting)</td><td></td></tr> <tr><td style="padding: 5px;">Date:</td><td></td></tr> </table>	Board Receipt of Complete Petition Packet		(At Regular Board Meeting)		Date:		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 5px;">Public Hearing</td><td style="width: 100px;"></td></tr> <tr><td style="padding: 5px;">(60 days from Board receipt at regular board meeting)</td><td></td></tr> <tr><td style="padding: 5px;">Date Due:</td><td></td></tr> <tr><td style="padding: 5px;">Date Held:</td><td></td></tr> </table>	Public Hearing		(60 days from Board receipt at regular board meeting)		Date Due:		Date Held:		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="padding: 5px;">Decision by Board of Education</td><td style="width: 100px;"></td></tr> <tr><td style="padding: 5px;">(90 days from receipt, may be extended 30 days if agreed by petitioner(s) and SLOCOE)</td><td></td></tr> <tr><td style="padding: 5px;">Date Due:</td><td></td></tr> <tr><td style="padding: 5px;"><input type="checkbox"/> 30-day extension to:</td><td></td></tr> <tr><td style="padding: 5px;">Date of Board Decision:</td><td></td></tr> </table>	Decision by Board of Education		(90 days from receipt, may be extended 30 days if agreed by petitioner(s) and SLOCOE)		Date Due:		<input type="checkbox"/> 30-day extension to:		Date of Board Decision:	
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Instructions to Review Committee: This checklist is designed to guide the review of charter school petitions. Throughout the evaluation, you are asked to rate the petitioner's response to the criteria required for each specific area as Strong, Sufficient, or Insufficient.

At the end of each section, please elaborate, in the comment section. Your comments are essential to understanding your assessment and will be used as part of the final analysis and report to the County Board. If insufficient, include concerns and/or additional questions. If Strong, include strengths.

The following rating definitions should be used to guide your assessment.

Strong:

The response reflects a thorough understanding of key issues and indicates capacity to open and operate a quality charter school. The section addresses the topic with concise, specific, and accurate information that shows thorough preparation, presenting a clear, realistic picture of how the school expects to implement and operate its program.

Sufficient:

The response indicates solid preparation and grasp of key issues that would be considered reasonably comprehensive. Overall, it contains many of the characteristics of a response that exceeds the required standard, although it may require additional specificity, support, or elaboration in places.

Insufficient:

The response addresses some of the selection criteria but lacks meaningful detail and requires important additional information in order to be reasonably comprehensive. It demonstrates lack of preparation, is unclear, or otherwise raises substantial concerns about the petitioner's understanding of the issue in concept and/or ability to implement or meet the requirement in practice

PROCEDURAL REQUIREMENTS FOR A CHARTER PETITION

Page #	REQUIRED PETITION SIGNATURES – Education Code 47605.6 (a)(1)(A) & (B)	Strong	Sufficient	Insufficient	N/A
	1. Parents/guardians, residing in San Luis Obispo County, representing at least 50% of the number of students charter school expect to enroll for its 1 st year of operation, in the form required by law.				
Page #	OR	Strong	Sufficient	Insufficient	N/A
	2. Fifty percent of the number of appropriately credentialed teachers expected to be employed at the school during its 1st year of operation, in the form required by law.				
	Reviewer Comments:				
Page #	REQUIRED AFFIRMATIONS – (Education Code 47605(e)(1))	Strong	Sufficient	Insufficient	N/A
	1. Statement that school will be non-sectarian in its programs, admission policies, employment practices, and all other operations, will not charge tuition, and will not discriminate against any pupil on the basis of ethnicity, national origin, gender, gender identity, gender expression, or disability or on the basis of any of the characteristics listed in Education Code 220.				
	Reviewer Comments:				

	A. EDUCATIONAL PROGRAM – (Education Code 47605(c)(5)(A)) <i>The educational program should 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 learner</i>				
Page #	1. Targeted School Populations, including:	Strong	Sufficient	Insufficient	N/A
	a. Age, grade levels and number of students.				
	b. Describe students whom the charter will attempt to educate; describe how the charter will improve learning for the targeted population.				
	c. Clear and concise Mission Statement that defines the purposes and nature of the charter school.				
Page #	2. Attendance	Strong	Sufficient	Insufficient	N/A
	a. Includes school year/day, academic calendar, number of school days and instructional minutes; includes mater/daily schedule and proposed bell scheduled.				
Page #	3. What it Means to be an Educated Person in the 21 st Century	Strong	Sufficient	Insufficient	N/A
	a. Objective of enabling pupils to become self-motivated, competent, lifelong learners.				
	b. Clear list of general academic skills and qualities important for an educated person.				

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	c. Clear list of general non-academic skills and qualities important for an educated person.				
Page #	4. Description of How Learning Best Occurs	Strong	Sufficient	Insufficient	N/A
	a. Framework for instructional design aligned with needs of target student population and based upon successful practice and research.				
	b. Description of instructional approaches and strategies including curriculum, teaching methods, materials, and technology.				
	c. Description of learning environment or environments (e.g., site-based, independent study, technology based, etc.).				
	d. Discussion of how chosen instructional approach will enable students to achieve objectives specified in the charter and master academic content standards in core curriculum areas.				
	e. Proposed program strongly aligned to school's mission.				
	f. Proposal includes, at a minimum, full curriculum for one course or grade level; Proposal also provides that a full curriculum will be submitted prior to the opening of school.				
	g. Describes how charter school will identify and respond to needs of students not achieving at or above expected levels.				
	h. Describes how the charter school will identify and respond to needs of students who are academically high achieving.				
	i. Describes how charter school will identify and respond to needs of English Learners.				
	j. Describes how charter school will identify and respond to needs of students with disabilities, including how it will serve students with moderate/severe disabilities (See Special Education section).				
	Reviewer Comments:				
	5. Annual Goals	Strong	Sufficient	Insufficient	N/A
	a. Annual goals are included for all pupils and for each subgroup or pupils identified pursuant to Section 52052, consistent with characteristics of the students the school intends to serve.				
	b. Goals address identified and applicable state priorities (listed in Ed Code 52060(d) – LCAP.				
	c. Includes specific annual actions to achieve the stated goals.				
	d. Additional school priorities related to unique aspects of the proposed charter program with goals and specific annual actions.				
Page #	6. Additional Requirements for Charter Schools Serving High School Students	Strong	Sufficient	Insufficient	N/A
	a. How Charter School will inform parents about the transferability of courses to other public high schools.				

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	b. How Charter School will inform parents about the eligibility of courses to meet college entrance requirements.				
	Reviewer Comments:				
Page #	B. MEASURABLE STUDENT OUTCOMES – (Education Code 47605(c)(B) <i>The outcomes evaluated in this section should represent the school’s definition of success. Pupil outcomes 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.</i>	Strong	Sufficient	Insufficient	N/A
	1. Pupil outcomes are clear, specific, and measurable, i.e., specific assessments listed for each exit outcome.				
	2. Pupil outcomes align with applicable state priorities, as described in Ed Code 52060(d) consistent with LCAP, that apply for the grade levels served and nature of the program.				
	3. Describes how pupil outcomes will address state content and performance standards in core academics.				
	4. Clearly stated exit outcomes including acquisition of academic and non-academic skills.				
	5. Affirmation that "benchmark" skills and specific classroom-level skills will be developed.				
	6. Affirmation/description: exit outcomes will align to mission, curriculum and assessments.				
	7. Affirmation that college-bound students wishing to attend California colleges or universities will have the opportunity to take courses that meet the “A–G” requirements.				
	8. Lists school-wide student performance goals students will achieve over a given period of time: projected attendance levels, dropout percentage, graduation rate goals, etc.				
	9. Acknowledges that exit outcomes and performance goals may need to be modified over time.				
	10. If high school, graduation requirements defined and WASC accreditation addressed.				
	Reviewer Comments:				
Page #	C. STUDENT PROGRESS MEASUREMENT – (Education Code 47605(c)(5)(C) <i>This section evaluates the petitioner’s plan for assessing and measuring students’ progress in meeting the pupil outcomes, (i.e. does it use both formative and summative evaluations for student performance) and how it will use the assessments to inform instruction</i>	Strong	Sufficient	Insufficient	N/A
	1. At least one assessment method or tool should be listed for each of the exit outcomes.				
	2. Assessments include multiple, valid and reliable measures using traditional/alternative tools to include assessment for all students, including special education students.				
	3. Charter school will meet all statewide standards and conduct the pupil assessments required pursuant to Ed Code 60605 and 60851 and any other pupil assessments applicable to pupils in non-charter schools. Assessments shall include all required state and federal assessments (including SBAC [ELA & Math], CAA [ELA, Math & Science], CAST, ELPAC, VCALPPS and Physical Fitness Test).				
	4. Chosen assessments are appropriate for the standards and skills they seek to measure.				

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	5. Description of how assessments align to mission, exit outcomes, and curriculum.				
	6. Describes minimal required performance level necessary to attain each standard.				
	7. Outlines plan for collecting, analyzing/utilizing and reporting student/school performance data to school staff, parents/guardians and SLOCOE, and for utilizing the data continuously to monitor and improve the charter school's education program.				
	Reviewer Comments:				
Page #	D. GOVERNANCE STRUCTURE – (Education Code 47605(c)(5)D) <i>This section should include, but not be limited to, the process to be followed by the school to ensure parental involvement</i>	Strong	Sufficient	Insufficient	N/A
	1. Includes evidence that the organizational and technical designs of the governance structure reflect:				
	a. Seriousness of purpose necessary to ensure that the charter school will become and remain a viable enterprise, and demonstrates understanding and assurance of compliance with open meeting requirements.				
	b. There will be active and effective representation of interested parties, including, but not limited to, a meaningful plan for involvement or input of parents/guardians in the governance of the school and consult with their parents, guardians, and teachers regarding the educational programs.				
	2. Describes key features of governing structure (usually a board of directors) such as:				
	a. Compliance with Brown Act, Public Records Act, Political Reform Act, Government Code Section 1090 and Conflict of Interest Code.				
	b. Size/composition of board, board committees and/or advisory councils.				
	c. Board's scope of authority/responsibility along with role of school administration.				
	d. Method for selecting initial board members along with Board election/appointment and replacement procedure.				
	e. Provides description of Board development in terms of supplementing necessary skills and providing training in effective board practices.				
	3. Include a clear delineation of roles and responsibilities of parent councils, advisory committees, and other supporting groups.				
	4. Includes proposed bylaws, basic policies for Board functions, as well as those necessary for opening and operating a school and/or similar documents.				
	5. Include specific policies and internal controls that will prevent fraud, embezzlement, and conflicts of interests and ensures the implementation and monitoring of those policies.				
	6. Provide the names and relevant qualifications of all persons whom the petitioner nominates to serve or currently serves on the governing board of the charter school and the process to be used to select them in the future.				
	7. Clear description and evidence of the legal organization of the charter school as a non-profit public benefit corporation, including evidence of non-profit public benefit status.				

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	8. Charter school and SLOCOE have outlined other important legal and operational requirements in accordance with a Memorandum of Understanding to be executed at the same SLOCOE Board Meeting as the approval of the charter petition.				
	9. Clear description of the level of autonomy the charter school has in relation to third party vendors and/or charter management organizations over budget, expenditures, personnel, and daily operations.				
	Reviewer Comments:				

Page #	E. EMPLOYEE QUALIFICATIONS – (Education Code 47605(c)(5))(E) <i>This section evaluates how effective the school’s leadership and management structure is likely to be based on the plan for hiring, staffing qualified teachers, and development of procedures and controls regarding the administration of the school.</i>	Strong	Sufficient	Insufficient	N/A
	1. Describes qualifications to be met by those to be employed by school, including standards to be used in hiring teachers, administrators, and other school staff.				
	2. Includes general qualifications for various categories of employees and desired professional backgrounds, depth of experience and other qualities to be sought in their selection.				
	3. Specifies key positions along with additional qualifications expected of individuals to be selected for these positions.				
	4. Defines core and college preparatory teachers, and affirms all teachers will hold appropriate Commission on Teacher Credentialing certificates required for the teacher’s certificated assignment, as required by law.				
	5. Assurances that all teachers in charter schools shall obtain a certificate of clearance and satisfy the requirements for professional fitness pursuant to Sections 44339, 44340, and 44341.				
	6. A clear plan for recruitment, selection, development, and evaluation of staff including the charter school leader.				
	7. An approved and public organizational chart delineating board and management roles and lines of authority.				
	Reviewer Comments:				
Page #	F. HEALTH AND SAFETY PROCEDURES – (Education Code 47605(c)(5)(F)	Strong	Sufficient	Insufficient	N/A
	1. Affirms that each employee will furnish the school with a criminal background clearance report, as well as proof of freedom from tuberculosis prior to employment.				
	2. Includes a Comprehensive Charter School Safety Plan and assurance that all charter school staff will be trained on this plan and that the plan will be updated annually.				
	3. Outlines specific health and safety practices addressing such key areas as:				
	a. Mandated Child Abuse Reporting.				
	b. Natural disasters and emergencies, including seismic safety (structural integrity and earthquake preparedness).				

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	c. Required Immunizations, vision, hearing, and scoliosis health screenings, administration of medications to the same extent as would apply if the student attended a non-charter school.				
	d. Zero tolerance for use of drugs and tobacco.				
	e. Staff training on emergency and first aid response.				
	4. References accompanied by a detailed set of health and safety related policies/procedures or the date by which they will be adopted and submitted to the SLOCOE.				
	5. Affirmation that charter schools with grades 7-12 will adopt a Suicide Prevention Policy.				
	6. Assurances that the charter school will adopt procedures to prevent acts of bullying and cyberbullying and provide training to all employees who interact with students.				
	7. Assurances on the compliance with Americans with Disabilities Act (ADA).				
	Reviewer Comments:				
Page #	G. RACIAL AND ETHNIC BALANCE – (Education Code 47605(c)(5)(G)) <i>This section evaluate the ways in which the charter school will address efforts to achieve a racial and ethnic balance that is reflective of the general population within the district in which it is proposed to be located.</i>	Strong	Sufficient	Insufficient	N/A
	1. Lists specific practices/policies designed, and that will be implemented, to attract a diverse applicant pool/enrollment.				
	2. Practices and policies appear likely to achieve targeted racial and ethnic balance.				
	Reviewer Comments:				
Page #	H. ADMISSIONS REQUIREMENTS – (Education Code 47605(b)(5)(H))	Strong	Sufficient	Insufficient	N/A
	1. Includes the following assurances: The charter school shall be nonsectarian in its programs, admissions policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against a pupil on the basis of disability, gender, gender identify, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set form in Section 422.55 of the Penal Code, including immigration status, equal rights, and opportunities in the educational institutions of the state.				
	2. Admission preferences which are required for conversion charter schools, if applicable.				
	3. Clearly describes admissions requirements, including any admission preferences. Includes assurances that all admission preferences shall be approved by the chartering authority at a public hearing, shall be consistent with federal law, the California Constitution and Section 200, and preferences shall not result in limiting or negatively impacting the racial, ethnic, and unduplicated balance the charter school strives to reflect.				
	4. Proposed admissions and enrollment process and timeline, as well as procedures for public random drawings, if necessary.				
	5. Assurances that the charter school shall admit all pupils who wish to attend the charter school.				

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	6. Assurances that the charter school may encourage parental involvement but shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to, or continued enrollment at, the charter school.				
	Reviewer Comments:				

Page #	I. FINANCIAL AUDIT – (Education Code 47605(c)(5)(I))	Strong	Sufficient	Insufficient	N/A
	1. Describes manner in which annual, independent financial audit will be completed by December 15 th following the close of each fiscal year.				
	2. Describes who will be responsible for contracting and overseeing the independent audit.				
	3. Specifies that the auditor will have experience in education finance.				
	4. Provides scope and timing of audit, as well as required distribution of completed audit to the San Luis Obispo County Office of Education, State Controller's Office, and California Department of Education.				
	5. Process and timeline for addressing any audit findings and/or resolving any audit exceptions and deficiencies to the satisfaction of the San Luis Obispo County Office of Education.				

Reviewer Comments:

Page #	J. PUPIL SUSPENSION AND EXPULSION – (Education Code 47605(c)(5)(J))	Strong	Sufficient	Insufficient	N/A
	1. Provides process for suspensions of fewer than 10 days, including:				
	a. Oral or written notice of the charges against the pupil.				
	b. If the pupil denies the charges, an explanation of the evidence that supports the charges.				
	c. How an opportunity will be provided for the pupil to present his/her rebuttal to the charges.				
	2. Provides a process for suspensions of 10 days or more and all other expulsions for disciplinary reasons, including:				
	a. Timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights.				
	b. The process of a hearing adjudicated by a neutral officer within a reasonable number of days, and at which the pupil has the right to bring legal counsel or an advocate.				
	3. Provides a clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided written notice of intent to remove the pupil no less than five schooldays before the effective date of the action. The written notice shall be in the native language of the pupil or the pupil's parents or guardian or, if the pupil is a foster child or youth or a homeless child or youth, the pupil's educational rights holder, and shall inform him or her of the right to initiate the procedures specified in 2b above. If the pupil's parent, guardian or educational rights holder initiates the procedures specified in 2b above, the pupil shall remain enrolled shall				

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	not be removed until the charter school issues a final decision. For purposes of this clause, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions specified in 1 and 2 above.				
	4. Reference to a comprehensive set of student disciplinary policies.				
	5. Outlines or describes strong understanding of relevant laws protecting constitutional rights of students, generally, and of disabled and other protected classes of students, in particular.				
	6. Policies balance students' rights to due process with responsibility to maintain a safe learning environment.				
	7. Explains how policies and procedures regarding suspension and expulsion will be periodically reviewed and modified.				
	Reviewer Comments:				

Page #	K. STAFF RETIREMENT SYSTEM – (Education Code 47605(c)(5)K)	Strong	Sufficient	Insufficient	N/A
	1. Describes manner by which staff members will be covered by STRS, PERS and/or federal social security; or how the charter school will create a system to address employees' retirement funding.				
	2. Specifies specific positions to be covered by each system and staff designated to ensure that arrangements for coverage are made.				
	Reviewer Comments:				
Page #	L. PUBLIC SCHOOL ATTENDANCE ALTERNATIVES – (Education Code 47605(c)(5)(L)	Strong	Sufficient	Insufficient	N/A
	1. Lists the public-school attendance alternatives for pupils residing within the school district who choose not to attend the charter school.				
	Reviewer Comments:				
Page #	M. LABOR RELATIONS – (Education Code 47605 (c)(5)(M)	Strong	Sufficient	Insufficient	N/A
	1. States charter school will be employer for EERA purposes.				
	2. 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.				
	Reviewer Comments:				
Page #	N. DISPUTE RESOLUTION – (Education Code 47605(c)(5)(N)	Strong	Sufficient	Insufficient	N/A
	1. The petitioner identifies procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter.				
	2. Outlines process by which charter school will resolve internal complaints and disputes.				
	3. Acknowledges that except those disputes between the Authorizer and the School, all disputes involving the school shall be resolved by the school according to its own internal policies.				
	Reviewer Comments:				

Page #	O. CLOSURE PROCEDURES – (Education Code 47605(c)(5)(O))	Strong	Sufficient	Insufficient	N/A
	1. Outlines a detailed description of the process to be used if the charter school closes.				
	2. Process includes a final audit of the charter school, specific plans for disposition of all net assets and liabilities, as well as for the maintenance and transfer of pupil records and personnel records in accordance with applicable law.				
	Reviewer Comments:				
	II. ADDITIONAL REQUIRED CHARTER ELEMENTS				
Page #	A. EXCLUSIVE PUBLIC SCHOOL EMPLOYER – (Education Code 47605 (c)(6))	Strong	Sufficient	Insufficient	N/A
	1. Petition includes a declaration whether or not the charter school shall be deemed the exclusive public-school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act.				
	Reviewer Comments:				
Page #	B. FACILITIES	Strong	Sufficient	Insufficient	N/A
	1. Includes the location of each charter school facility which the petitioner proposes to operate, including size and configuration.				
	2. Describes the current and projected availability of each charter school site, including a schedule for securing the facility including the person responsible for securing the location.				
	3. Describes each charter school facility which the petitioner plans to operate in terms of safety and educational suitability.				
	4. An assurance of legal compliance with health & safety, ADA, and applicable building codes.				
	5. Adequate budget for anticipated facilities cost including renovation, rent, maintenance and utilities.				
	Reviewer Comments:				
Page #	C. SUCCESSFUL IMPLEMENTATION	Strong	Sufficient	Insufficient	N/A
	1. The Petition includes a thorough description of the education, work experience, credentials, degrees, and certifications of the individuals comprising, or proposed to comprise, the directors, administrators, and managers of the proposed charter school.				
	2. The Petition includes a list of consultants whom the charter school has engaged, or proposes to engage, for the purpose of developing, operating, and evaluating the charter school, together with a thorough description of the qualifications of such consultants.				
	3. Does the information provided in the proposal confirm that the school will have the services of individuals who have the necessary background in curriculum, instruction, assessment, finance, facilities, business management, organization, governance and administration?				

Charter Petition Name:

	4. If the petitioners have a past history of involvement in charter schools or other educational agencies (public or private), the history is one that the Board of Education regards as successful.				
	5. The Petition as a whole shows evidence that the Petitioner understands and is familiar with the requirements of law.				
	6. Petition demonstrates that the charter school will commence operation by September 30 of its first year of operation.				
	Reviewer Comments:				
Page #	D. COMMUNITY IMPACT – (Education Code 47605(c)(7) New Petitions or Expanding Program Renewals	Strong	Sufficient	Insufficient	N/A
	1. The petition describes how the charter school will not substantially undermine existing school district services, academic offerings, or programmatic offerings.				
	2. The petition describes how the charter school will not duplicate a program currently offered by the school district, and the existing district program has sufficient capacity for the pupils proposed to be served within reasonable proximity to where the charter school intends to locate.				
	Reviewer Comments:				
Page #	E. FINANCIAL & ORGANIZATIONAL ACCOUNTABILITY – (Education Code 47605(h))	Strong	Sufficient	Insufficient	N/A
	1. A detailed review of the annual budget development, implementation and review process including the process by which the charter school leadership and governance team will monitor and report regarding the continuing financial solvency of the school.				
	2. Detailed description of the manner, format, and content by which the charter school will regularly report its current and projected financial viability.				
	3. Detailed description of the organization, scope, and preparation of the following financial documents and reports:				
	a. A preliminary budget on or before July 1 each year.				
	b. An interim financial report, reflecting changes through October 31, on or before December 15 each year.				
	c. A second interim financial report, reflecting changes through January 31, on or before March 15 each year.				
	d. A final unaudited, financial report for the full prior year on or before September 15 each year.				
	4. Description of the process by which the school will comply with all reports required for charter schools by law; includes sending a copy of each required report to SLOCOE.				
	5. Describe structure for administrative services and business operations, including personnel transactions, accounting and payroll processes that reflect an understanding of school business practices and expertise.				
	Reviewer Comments:				

REQUIRED SUPPLEMENTAL INFORMATION – Education Code 47605(h)					
F. FINANCIAL PLAN					
Page #	1. First year operational budget	Strong	Sufficient	Insufficient	N/A
	a. Start-up costs				
	b. Cash flow for first three years				
	c. Financial projections for first three year				
	Reviewer Comments:				
Page #	2. Planning Assumptions	Strong	Sufficient	Insufficient	N/A
	a. Number/types of students				
	b. Number of staff				
	c. Facilities needs				
	d. Costs of all major items are identified and within reasonable market ranges				
	e. Revenue assumptions in line with state and federal funding guidelines				
	f. Revenue from “soft” sources less than 10% of ongoing operational costs				
	g. Timeline allows window for referenced grant applications to be submitted and funded				
	Reviewer Comments:				
Page #	3. Start-up Costs	Strong	Sufficient	Insufficient	N/A
	a. Clearly identifies all major start-up costs				
	i. Staffing				
	ii. Facilities				
	iii. Equipment and Supplies				
	iv. Professional Services				
	b. Assumptions in line with overall school design plan				
	c. Identifies potential funding source				
	d. Timeline allows for grant and fundraising money to become available				
	Reviewer Comments:				
Page #	4. Annual Operating Budget	Strong	Sufficient	Insufficient	N/A
	a. Annual revenues and expenditures clearly identified by source				
	b. Revenue assumptions closely related to applicable state and federal funding formulas				
	c. Expenditure assumptions reflect school design plan				
	d. Expenditure assumptions reflect market costs				
	e. “Soft” revenues not critical to solvency				
	f. Strong reserve or projected ending balance (the larger of 3% of expenditures or \$25,000)				

Charter Petition Name:

	g. If first year is not in balance, identifies solvency in future years and sources of capital sufficient to cover deficits until the school year when the budget is projected to balance				
	h. Expenditure for general liability, workers compensation & other types of insurance with evidence that petitioners have researched cost and availability: policies to name the SLOCOE as also insured and provide hold harmless agreement				
	i. Expenditure sufficient for reasonably expected legal services: \$12K-yr. 1-3 \$6.6k-yr. 4 \$6.7K-yr. 5				
	j. Expenditure for Special Education excess costs consistent with current experience in the school district/county, including special education staff, related services staff, and legal services				
	k. Expenditure for facilities – if specific facilities not secured, reasonable projected cost				
	l. LCAP expenditures align with operating budget				
	Reviewer Comments:				
Page #	5. Cash Flow Analysis	Strong	Sufficient	Insufficient	N/A
	a. Monthly projection of revenue receipts in line with local/state/federal funding disbursements.				
	b. Expenditures projected by month and correspond with typical/reasonable schedules.				
	c. Show positive fund balance each month and/or identify sources of working capital.				
	Reviewer Comments:				
Page #	6. Long Term Plan	Strong	Sufficient	Insufficient	N/A
	a. Projects revenues and expenditures for at least two additional years				
	b. Revenue assumptions based on reasonable potential growth in local, state, and federal revenues				
	c. Revenue assumptions based on reasonable student growth projections				
	d. Revenue to support meal program as defined in Ed Code Section 49552				
	e. Reasonable cost-of-living and inflation assumptions				
	f. Annual fund balances are positive, or sources of supplemental working capital are identified				
	Reviewer Comments:				

	G. SPECIAL EDUCATION/SELPA				
Page #	1. Plan for Comprehensive Special Education Program	Strong	Sufficient	Insufficient	N/A

Charter Petition Name: _____

	a. Identifies whether the charter will operate special education programs as a school under the chartering authority or will apply to be its own LEA for special education purposes.				
	b. Provides that the charter school will assume full responsibility for appropriate programs, services accommodations and modifications to address the needs of the student.				
	c. The petition acknowledges the responsibility of the charter school to provide special education, instruction and related services to the students enrolled in the school regardless of students' district of residence.				
	d. Has consulted with the San Luis Obispo County SELPA prior to submission of the charter petition.				
	i. Discussed special education responsibilities of charter.				
	ii. Discussed application of SELPA policies.				
	iii. Discussed the procedure the charter school will follow if it is unable to provide the appropriate special education programs/services at the charter school site to ensure the student receives the appropriate program/services funded by the charter, including moderate to severe students.				
	e. Describes how special education services will be provided consistent with San Luis Obispo County SELPA Plan and/or policies and procedures.				
	f. Includes fiscal allocation plan for providing special education services.				
	Reviewer Comments:				
Page #	2. Required Elements	Strong	Sufficient	Insufficient	N/A
	a. Clarifies in charter or an MOU the responsibilities of each party for special education service delivery				
	b. Describes process for referrals				
	c. Outlines methods of assessment				
	d. Provides comprehensive description of Instructional program for special education students				
	e. Describes plan for notification and implementation of due process rights				
	f. Provides agreements describing allocation of actual and excess costs				
	g. Provides assurances that charter will be fiscally responsible for fair share of any encroachment on general funds				
	h. Includes assurances that the charter will comply with all provisions of IDEA				
	i. Includes assurances that no student will be denied admission based on disability or lack of available services				
	j. Described implementation of a Student Study Team process				
Page #	3. If Charter Will Apply to be its own LEA for Special Education Purposes within SELPA	Strong	Sufficient	Insufficient	N/A
	a. Notify SELPA Director of intent prior to February 1 st of the preceding school year				

Charter Petition Name: _____

	b. Located within San Luis Obispo County SELPA geographical boundaries				
	c. Provides current operating budget in accordance with Ed Code 42130 and 42131				
	d. Provides assurances that all students will be instructed in safe environment				
	e. Provides copy of original charter petition and any amendments				
	f. Responsible for any legal fees relating to application and assurances process				
	g. Meets the terms of the "Agreement Regarding the Organization, Implementation, Administration and Operation of the San Luis Obispo SELPA"				
	h. Meets the terms of all San Luis Obispo SELPA policies and procedures				
	i. Charter fiscally responsible for fair share of any encroachment on general funds				
	Reviewer Comments:				
Page #	4. Overview of how special education funding and services will be provided by:	Strong	Sufficient	Insufficient	N/A
	a. Charter School				
	b. San Luis Obispo County Office of Education				
	c. SELPA				
	Reviewer Comments:				