Charter Petition Review Matrix
For Petitions Presented Pursuant to EC 47605, EC 47605.5 (County Program), 47607
(47605, 47605.5 Renewal or Appeal)

<table>
<thead>
<tr>
<th>Proposed Charter School</th>
<th>Petitioner Contact Information</th>
<th>Petition Review Time Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Proposed Charter School:</td>
<td>Name:</td>
<td>Petition Received: Date:</td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
<td>Determined to be Complete* Date:</td>
</tr>
<tr>
<td>Cell:</td>
<td></td>
<td>*within 3 workdays of receipt, if possible</td>
</tr>
<tr>
<td>Location of Proposed School:</td>
<td>Email:</td>
<td>Public Hearing Date Due: 30 days from determination</td>
</tr>
<tr>
<td></td>
<td>Address:</td>
<td>Date Held:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area of Review</th>
<th>Name/Position of Reviewer(s)</th>
<th>Date(s) of Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Petition Requirements</td>
<td></td>
<td></td>
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<tr>
<td>Dispute Resolution</td>
<td></td>
<td></td>
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<tr>
<td>Educational Program</td>
<td></td>
<td></td>
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<tr>
<td>English Language Learner Program</td>
<td></td>
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<tr>
<td>Fiscal Viability</td>
<td></td>
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<tr>
<td>Governance</td>
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<tr>
<td>Health and Safety</td>
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<tr>
<td>Independent Study</td>
<td></td>
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<tr>
<td>Personnel</td>
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<tr>
<td>Students With Disabilities</td>
<td></td>
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<tr>
<td>Student Discipline</td>
<td></td>
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<tr>
<td>Other:</td>
<td></td>
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</tbody>
</table>

Reviewer Directions:
1. The review matrix is color-coded according to the area of review. The items for which you are responsible have the number column shaded in the same color as your area of review in the chart above.
2. The gray shaded column in the matrix provides you with guidance in conducting your review.
3. Please make notes, either on the matrix or a separate sheet of paper to support your finding of whether or not a standard has been met.
4. If you find that a standard has not been met, you will use transfer that information to the Summary of Findings form, following the directions on that document.
# Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Item</th>
<th>Ed Code Reference (Required Elements)</th>
<th>Evaluation Guidance</th>
<th>Located on Page(s)</th>
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</thead>
<tbody>
<tr>
<td><strong>PRIVATE SCHOOL RESTRICTIONS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Private school conversion not allowed</td>
<td>1.</td>
<td>47602(b) No charter shall be granted under this part that authorizes the conversion of any private school to a charter school.</td>
<td>The petition does not represent a conversion of a private school to a charter school.</td>
<td></td>
<td>Standard Met</td>
</tr>
<tr>
<td>Concurrent enrollment</td>
<td>2.</td>
<td>47602(b) No charter shall receive any public funds for a pupil if the pupil also attends a private school that charges the pupil's family for tuition.</td>
<td>The petition does not allow concurrent enrollment in a private school.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SIGNATURE REQUIREMENTS</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Parent Signatures</td>
<td>3.</td>
<td>47605(a)(1)(A) The petition is signed by a number of parents or 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.</td>
<td>Renewal does not require signatures.</td>
<td></td>
<td>Standard Met</td>
</tr>
<tr>
<td>OR</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Teacher Signatures</td>
<td>4.</td>
<td>47605(a)(1)(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 school during its first year of operation.</td>
<td></td>
<td></td>
<td>Standard Met</td>
</tr>
<tr>
<td>Conversion of existing public school</td>
<td>5.</td>
<td>47605(a)(2) A petition that proposes to convert an existing public school to a charter school that would not be eligible for a loan pursuant to subdivision (b) of Section 41365 may be circulated by one or more persons seeking to establish the charter school. The petition may be submitted to the governing board of the school district for review after the petition is signed by not less than 50 percent of the permanent status teachers currently employed at the public school to be converted.</td>
<td></td>
<td></td>
<td>Standard Met</td>
</tr>
</tbody>
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# Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

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<tbody>
<tr>
<td>Signature indicates meaningful interest</td>
<td>6.</td>
<td>☐ Evidence that petition was attached to signature page</td>
<td>Page(s)</td>
<td>Standard Met Yes No Partial</td>
</tr>
<tr>
<td>GRADE LEVELS TO BE SERVED BY THE CHARTER SCHOOL</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Must serve all grade levels served by the district</td>
<td>7.</td>
<td>☐ Signature requirement met</td>
<td></td>
<td>Yes No Partial</td>
</tr>
<tr>
<td>Sound Educational Program</td>
<td>8.</td>
<td>☐ Statement on petition that signature indicates interest in school</td>
<td></td>
<td>Yes No Partial</td>
</tr>
<tr>
<td>Required elements that indicate the School’s likelihood of successful implementation</td>
<td>9.</td>
<td></td>
<td></td>
<td>Yes No Partial</td>
</tr>
</tbody>
</table>

47605(b) A governing board shall grant a charter for the operation of a school under this part if it is satisfied that granting the charter is consistent with sound educational practice. The board shall not deny a petition for the establishment of a charter school unless it makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the following findings: (47605)(b)(1) or 47605(b)(2)

Reviewer: Consider the information in 47605(b)(5) when making this determination.
### Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

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<td>47605(b)(2)</td>
<td></td>
<td>the petitioners are demonstrably unlikely to successfully implement the program (continued from previous page)</td>
<td>□ expertise to carry out the necessary administrative services, or: □ A reasonable plan and time line to develop and assemble such practices and expertise. □ For contract services, describes criteria for selection of contractor(s). <strong>In the area of financial administration</strong>, include, at a minimum: □ 1st year operational budget, start-up costs, and cash flow, and financial projections for the 1st 3 years. □ Include reasonable estimates of all anticipated revenues and expenditures necessary to operate the school, including but not limited to, special education, based, when possible, on historical data from schools or school districts of similar type, size, and location. □ Budget notes that clearly describe assumptions on revenue estimates, including, but not limited to, the basis for average daily attendance estimates and staffing levels. □ Present a budget that in its totality appears viable and over a period of no less than 2 years of operations provides for the amassing of a reserve equivalent to that required by law for a school district of similar size to the proposed charter school. □ Demonstrate an understanding of the timing of the receipt of various revenues and their relative relationship to timing of expenditures that are within reasonable parameters, based, when possible, on historical data from schools or school districts of similar type, size, and location. <strong>In the area of Insurance</strong>, the charter and supporting documents adequately provide for the acquisition of and budgeting for general liability, workers compensation, and other necessary insurance of the type and amounts required for an enterprise of similar purpose and circumstance. <strong>In the area of facilities</strong>, the charter and supporting documents adequately: □ Describe the types and potential location of facilities needed to operate the size and scope of educational program proposed in the charter. □ If a specific facility has not been secured, provide evidence of the type and projected cost of the facilities that may be available in the location of the proposed charter school. □ Reflect reasonable costs for acquisition or leasing of facilities to house the school, taking into account the facilities the charter school may be allocated under the provisions of EC 47614. □ The petitioners document they personally have the necessary background in the following areas critical to the charter school’s success, and the petitioners have a plan to secure the services of individuals who have the necessary background in these areas: □ Curriculum, instruction, and assessment</td>
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### CCR Title 5: 11967.5.1(g) Definition of “Reasonable Comprehensive Description”

A “reasonably comprehensive” description, within the meaning of subdivision (f) of this section and Education Code 47605(b)(5) shall include, but not be limited to, information that:

1. Is substantive and is not, for example, a listing of topics with little elaboration.
2. For elements that have multiple aspects, addresses essentially all aspects of the elements, not just selected aspects.
3. Is specific to the charter petition being proposed, not to charter schools or charter petitions generally.
4. Describes, as applicable, among the different elements how the charter school will:
   - Improve pupil learning
   - Increase learning opportunities for its pupils, particularly pupils who have been identified as academically low achieving.
   - Provide parents, guardians, and pupils with expanded educational opportunities.
   - Hold itself accountable for measurable performance-based pupil outcomes.
   - Provide vigorous competition with other public school options available to parents, guardians, and students.

### 47605(b)(5) REASONABLY COMPREHENSIVE DESCRIPTION of 47605(b)(5)(A-P)

#### A. EDUCATIONAL PROGRAM:

- **Description of Educational Program**
  - **47605(b)(5)(A)(i) 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.
    - How learning best occurs.
  - **11967.5.1 (f)(1) The description of the educational program of the school as required by Education Code, at a minimum:**
    - A. Indicates the proposed charter school’s target student population, including, at a minimum, grade levels, approximate number of pupils, and specific educational interests, backgrounds, or challenges.
    - B. Specifies a clear, concise school mission statement with which all elements and programs for the school are in alignment and which conveys the petitioners’ definition of and “educated person” in the 21st century, belief how learning best occurs, and goals consistent with enabling pupils to become or remain self-motivated, competent, and lifelong learners.

- **Annual Goals and Annual Actions to Achieve Goals for Subgroups in EC 52052**
  - **47605(b)(5)(A)(ii) 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.”
  - **11967.5.1 (f)(1) The description of the educational program of the school as required by Education Code, at a minimum:**
    - C. Includes a framework for instructional design that is aligned with the needs of pupils that the charter school has identified as its target student population.
    - D. Indicates the basic learning environment of environments (e.g., site-based matriculation, independent study, community-based education, or technology-based education).
    - E. Indicates the instructional approach or approaches the charter school will utilize, including, but not limited to, the curriculum and teaching methods (or a process for developing the curriculum or teaching methods) that will enable the school’s pupils to master the content standards for the four core curriculum areas adopted by the SBE pursuant to EC 60605 and to achieve the objectives specified in the charter.
    - F. Indicates how the charter school will identify and respond to the needs of pupils who are not achieving at or above expected levels.
    - G. Indicates how the school will meet the needs of students with disabilities, English learners, students achieving substantially above or below grade level expectations, and other special student populations.
    - H. Addresses annual goals for all pupils and for each subgroup of pupils identified in 52052 to be achieved in the state.
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For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

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| **Section 52052** Referenced in item 11 **Subgroups to be address in Educational Plan** | 12.  | *52052. (a) (2) A school or school district shall demonstrate comparable improvement in academic achievement as measured by the API by all numerically significant pupil subgroups at the school or school district, including:*  
  - (A) Ethnic subgroups.  
  - (B) Socioeconomically disadvantaged pupils.  
  - (C) English learners.  
  - (D) Pupils with disabilities.  
  - (E) Foster youth.  
  - (3) (A) For purposes of this section, a numerically significant pupil subgroup is one that consists of at least 30 pupils, each of whom has a valid test score.  
  - (B) Notwithstanding subparagraph (A), for a subgroup of pupils who are foster youth, a numerically significant pupil subgroup is one that consists of at least 15 pupils. | Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard. | - | - |
| **Section 52060(d)** Referenced in item 11 **State Priorities** | 13.  | **52060(d). All of the following are state priorities:**  
  - (1) The degree to which the teachers of the school district are appropriately assigned in accordance with Section 44258.9, and fully credentialed in the subject areas, and, for the pupils they are teaching, every pupil in the school district has sufficient access to the standards-aligned instructional materials as determined pursuant to Section 60119, and school facilities are maintained in good repair as specified in subdivision (d) of Section 17002.  
  - (2) Implementation of the academic content and performance standards adopted by the state board, including how the programs and services will enable English learners to access the common core academic content standards adopted pursuant to Section 60605.8 and the English language development standards adopted pursuant to Section 60611.3 for purposes of gaining academic content knowledge and English language proficiency.  
  - (3) Parental involvement, including efforts the school district makes to seek parent input in making decisions for the school district and each individual schoolsite, and including how the school district will promote parental participation in programs for unduplicated pupils and individuals with exceptional needs.  
  - (4) Pupil achievement, as measured by all of the following, as applicable:  
    - (A) Statewide assessments administered pursuant to Article 4 (commencing with Section 60640) of Chapter 5 of Part 33 or any subsequent assessment, as certified by the state board.  
    - (B) The Academic Performance Index, as described in Section 52052.  
    - (C) The percentage of pupils who have successfully completed courses that satisfy the requirements for entrance to the University of California and the California State University, or career technical education sequences or programs of study that align with state board-approved career technical educational standards and frameworks, including, but not limited to, those described in subdivision (a) of Section 52302, subdivision (a) of Section 52372.5, or paragraph (2) of subdivision (e) of Section 54692.  
    - (D) The percentage of English learner pupils who make progress toward English proficiency as measured by the California English Language Development Test or any subsequent assessment of English proficiency, as certified by the state board.  
    - (E) The English learner reclassification rate.  
    - (F) The percentage of pupils who have passed an advanced placement examination with a score of 3 or higher.  
    - (G) The percentage of pupils who participate in, and demonstrate college preparedness pursuant to, the Early Assessment Program, as described in Chapter 6 (commencing with Section 99300) of Part 65 of Division 14 of Title 3, or any subsequent assessment of college | Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard. | - | - |
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Transferability of High School Courses</strong></td>
<td>13. (cont.)</td>
<td>(5) Pupil engagement, as measured by all of the following, as applicable: □ (A) School attendance rates. □ (B) Chronic absenteeism rates. □ (C) Middle school dropout rates, as described in paragraph (3) of subdivision (a) of Section 52052.1. □ (D) High school dropout rates. □ (E) High school graduation rates. (6) School climate, as measured by all of the following, as applicable: □ (A) Pupil suspension rates. □ (B) Pupil expulsion rates. □ (C) Other local measures, including surveys of pupils, parents, and teachers on the sense of safety and school connectedness. □ (7) The extent to which pupils have access to, and are enrolled in, a broad course of study that includes all of the subject areas described in Section 51210 and subdivisions (a) to (j), inclusive, of Section 51220, as applicable, including the programs and services developed and provided to unduplicated pupils and individuals with exceptional needs, and the program and services that are provided to benefit these pupils as a result of the funding received pursuant to Section 42238.02, as implemented by Section 42238.03. □ (8) Pupil outcomes, if available, in the subject areas described in Section 51210 and subdivisions (a) to (j), inclusive, of Section 51220, as applicable.</td>
<td></td>
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<tr>
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<td></td>
<td>If serving high school students, describes how district/charter school informs parents about: 1. Transferability of courses to other public high schools; and 2. Eligibility of courses to meet college entrance requirements 3. Courses that are accredited by the Western Association of Schools and Colleges (WASC) may be considered transferable, and courses meeting the UC/CSU “a-g” admissions criteria may be considered to meet college entrance requirements.</td>
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</tr>
<tr>
<td><strong>B. MEASURABLE PUPIL OUTCOMES</strong></td>
<td>14.</td>
<td>47605(b)(5)(A)(iii) If 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.</td>
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<tr>
<td></td>
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<td>At a minimum: □ A. Specify skills, knowledge, and attitudes that reflect the school's educational objectives and can be assessed. At a minimum, by objective means that are frequent and sufficiently detailed enough to determine whether pupils are making satisfactory progress. □ It is intended that the frequency of objective means of measuring pupil outcomes vary according to such factors as grade level, subject matter, the outcome of previous objective measurements, and information that may be collected from anecdotal sources. To be sufficiently detailed, objective means of measuring pupil outcomes must be capable of being used readily to evaluate the effectiveness of and to modify instruction of individual students and for groups of students. □ B. Include the school's API growth target, if applicable.</td>
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</tr>
<tr>
<td><strong>Measurable Pupil Outcomes</strong></td>
<td>15.</td>
<td>47605(b)(5)(B) 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. ...shall include outcomes that address increases in pupil academic achievement both schoolwide and for all of the groups of pupils served by the charter school, as the term is defined in subparagraph (B) of subdivision (a) of §47607.</td>
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**Section 52060(d)** Referenced in item 11 (continued)
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<td><strong>C. METHOD OF MEASURING PUPIL OUTCOMES</strong></td>
<td></td>
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</table>
| Assessment Tools | 16. | 47605(b)(5)(C) The method by which pupil progress in meeting those pupil outcomes is to be measured. To the extent practicable, consistent with the way information is reported on a school accountability report card. | At a minimum:  
☐ A. Utilizes a variety of assessment tools appropriate to the skills, knowledge, or attitudes being assessed, including, at a minimum, tools that employ objective means of assessment consistent with paragraph A (in Section B above).  
☐ B. Include the annual assessment results from the STAR program.  
☐ C. Outlines a plan for collecting, analyzing, and reporting data continuously to monitor and improve the charter school’s educational program. | Page(s) | |
| | | | | | |
| **D. GOVERNANCE STRUCTURE OF THE SCHOOL** | | | | | |
| School Governance Including Parental Involvement | 17. | 47605(b)(5)(D) The governance structure of the school, including but, not limited to, the process to be followed by the school to ensure parental involvement. | At a minimum:  
☐ A. Includes evidence of the charter school’s incorporation as a non-profit public benefit corporation, if applicable.  
☐ B. Includes evidence that the organizational and technical designs of the governance structure reflect a seriousness of purpose necessary to ensure that:  
1. The charter school will become and remain a viable enterprise.  
2. There will be active and effective representation of interested parties, including, but not limited to parents (guardians).  
3. The educational program will be successful | Page(s) | |
| | | | | | |
| **E. EMPLOYEE QUALIFICATIONS** | | | | | |
| Employees | 18. | 47605(b)(5)(E) The qualifications to be met by individuals to be employed by the school. | At a minimum:  
☐ A. Identify general qualifications for the various categories of employees the school anticipates: For example:  
☐ Administrative  
☐ Instructional  
☐ Instructional support  
☐ Non-instructional support  
☐ B. Identify those positions that the charter school regards as key in each category and specify the additional qualifications expected of individual assigned to those positions.  
☐ C. Specify that the requirements for employment set forth in applicable provisions of law will be met, including, but not limited to credentials as necessary. | Page(s) | |


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</tbody>
</table>
| | Student/Staff Health and Safety | 19. 47605(b)(5)(F) | The procedures that the school will follow to ensure the health and safety of pupils and staff. These include the requirement that each employee of the school furnish the school with a criminal record summary as described in §44237. | At a minimum:  
- A. Require that each employee of the school furnish the school with a criminal record summary as described in EC 44237.  
- B. Include the examination of faculty and staff for tuberculosis  
- C. Require immunization of pupils as a condition of school attendance to the same extent as would apply if the pupils attended a non-charter public school.  
- D. Provide for the screening of pupils' vision and hearing and the screening pupils for scoliosis to the same extent as would be required if the pupils attended a non-charter public school. | Page(s) | Standard Met Yes No Partial |
| G. MEANS TO ACHIEVE RACIAL AND ETHNIC BALANCE | Racial and ethnic balance reflective of district | 20. 47605(b)(5)(G) | 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. | To the extent admission requirements are included in keeping with EC 47605(b)(5)(H), the requirements shall be in compliance with the requirements of EC 47605(d) and any other applicable provision of law. | Page(s) | Standard Met Yes No Partial |
| H. ADMISSION REQUIREMENTS | Admissions | 21. 47605(b)(5)(H) | Admission requirements, if applicable. | Petition describes the policies and procedures the school will implement for the admission and enrollment of students. The requirements shall be in compliance with the requirements of EC 47605(d) and any other applicable provision of law. (See 47605(d)(2)(A)). | Page(s) | Standard Met Yes No Partial |
| I. MANNER OF CONDUCTING ANNUAL AUDIT AND RESOLVING AUDIT EXCEPTIONS | Audits | 22. 47605(b)(5)(I) | 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. | At a minimum:  
- A. Specify who is responsible for contracting and overseeing the independent audit.  
- B. Specify that the auditor will have experience in education finance.  
- C. Outline the process of providing audit reports to the SBE, CDE, or other agency as the SBE may direct, and specifying the time line in which audit exceptions will typically be addressed.  
- D. Indicate the process that the school will follow to address any audit findings and/or resolve any audit exceptions. | Page(s) | Standard Met Yes No Partial |
| J. STUDENT DISCIPLINE PROCEDURES | Discipline procedures | 23. 47605(b)(5)(J) | The procedures by which pupils can be suspended or expelled. | At a minimum:  
- A. Identify a preliminary list, subject to later revision pursuant to subparagraph ( E ), of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended and;  
- A². Separately, the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be expelled.  
- B. Identify the procedures by which pupils can be suspended or expelled.  
- C. Identify the procedures by which parents/guardians, and pupils will be informed about reasons for suspension or expulsion and of their due process rights in regard to suspension or expulsion. | Page(s) | Standard Met Yes No Partial |
## Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

<table>
<thead>
<tr>
<th>Requirement</th>
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<td>(Required Elements)</td>
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<td></td>
<td><strong>K. RETIREMENT PROGRAMS</strong></td>
<td></td>
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<tr>
<td>Retirement systems</td>
<td>24.</td>
<td>47605(b)(5)(K) The manner by which staff members of the charter school will be covered by the State Teachers' Retirement System, the Public Employees' retirement System, or federal social security.</td>
<td>Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard.</td>
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<td></td>
<td><strong>L. PUBLIC SCHOOL ALTERNATIVES</strong></td>
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<tr>
<td>Students not choosing charter school</td>
<td>25.</td>
<td>47605(b)(5)(L) The public school attendance alternatives for pupils residing with the school district who choose not to attend charter schools.</td>
<td>Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard.</td>
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<td></td>
<td></td>
<td><strong>M. EMPLOYEE RETURN RIGHTS</strong></td>
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<tr>
<td>Status of employee right of return to district</td>
<td>26.</td>
<td>47605(b)(5)(M) 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.</td>
<td>Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard.</td>
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## Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

### N. DISPUTE RESOLUTION

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</table>
| Dispute Resolution procedures | 27.  | 47605(b)(5)(N) the procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter. | At a minimum:  
☐ Describe how the costs of the dispute resolution process, if needed, would be funded.  
☐ Recognize that if the substance of a dispute is a matter that could result in the taking of appropriate action, including, but no limited to, revocation of the charter (47604.5), the matter will be addressed at the board’s discretion in accordance with that provision of law and any regulations pertaining thereto. | Page(s) | Standard Met Yes No Partial |

### O. DECLARATION OF EXCLUSIVE EMPLOYER

<table>
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<tr>
<th>Requirement</th>
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<tbody>
<tr>
<td>Employer for charter school</td>
<td>28.</td>
<td>47605(b)(5)(O) A declaration of whether or not the charter school shall be deemed the exclusive public school employer of the employees of the charter school for purposes of Chapter 7 (commencing with §3540) of Division 4 of Title 1 of the Government Code.</td>
<td>☐ Statement describing how charter school will comply with code.</td>
<td>Page(s)</td>
<td>Standard Met Yes No Partial</td>
</tr>
</tbody>
</table>

### P. SCHOOL CLOSURE PROCEDURE

<table>
<thead>
<tr>
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</table>
| Description of charter school closure | 29.  | 47605(b)(5)(P) 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. | ☐ Statement describing how charter school will comply with code. | Page(s) | Standard Met Yes No Partial |

### Student Assessment

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Item</th>
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</thead>
<tbody>
<tr>
<td>47605(c)(1) Charter Schools shall meet all statewide standards and conduct the pupil assessments required pursuant to Sections 60605 and 60851 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in non-charter public schools.</td>
<td></td>
<td></td>
<td>Petition describes how the school will meet all statewide standards and ensure that the requirements of education of education code are addressed in the state testing and other statewide standards authorized in statute or pupil assessments applicable to students in public schools.</td>
<td>Page(s)</td>
<td>Standard Met Yes No Partial</td>
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</table>

### Consultation with stakeholders

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<tr>
<th>Requirement</th>
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</thead>
<tbody>
<tr>
<td>47605(c)(2) Charter schools shall, on a regular basis, consult with parents, guardians and teacher regarding the schools educational programs.</td>
<td></td>
<td></td>
<td>Petition provides a description of how the school will consult with parents and teachers, on a regular basis, regarding the school's educational programs.</td>
<td>Page(s)</td>
<td>Standard Met Yes No Partial</td>
</tr>
</tbody>
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# Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

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</thead>
<tbody>
<tr>
<td>Affirmations</td>
<td>32.</td>
<td>47605(b)(4)</td>
<td><strong>REQUIRED AFFIRMATIONS</strong> “The petition does not contain an affirmation of each of the conditions described in subdivision (d)” constitutes reason for denial of charter petition.</td>
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<tr>
<td><strong>47605(d)(1)</strong> Charter school:</td>
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<td>☐ Shall be nonsectarian in its programs, admission policies, employment practices, and all other operations</td>
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<td>Page(s)</td>
<td>Standard Met Yes No Partial</td>
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<td>☐ Shall not charge tuition</td>
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<td>☐ Shall not discriminate against any pupil on the basis of ethnicity, national origin, gender, or disability.</td>
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<td>☐ Admission shall not be determined according to the place of residence of the pupil, or of his/her parent except in case of conversion charter school.</td>
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<td>☐ Includes a clear, unequivocal affirmation of each condition, not a general statement of intention to comply.</td>
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<td>☐ Neither the charter nor any of the supporting documents shall include any evidence that the charter will fail to comply with the conditions described in §47605 (d).</td>
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<tr>
<td><strong>Admissions</strong></td>
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<tr>
<td>Admissions</td>
<td>33.</td>
<td>47605(d)(2)(A)</td>
<td>A charter school shall admit all students who wish to attend.</td>
<td>Statement describing how charter school will comply with code.</td>
<td>Page(s)</td>
</tr>
<tr>
<td>Public random drawing</td>
<td>34.</td>
<td>47605(d)(2)(B)</td>
<td>If the number of pupils who wish to attend the charter school exceeds the school's capacity, attendance, except for existing pupils of the charter school, shall be determined by a public random drawing. Preference shall be extended to pupils currently attending the charter school and pupils who reside in the district except as provided for in Section 47614.5. Other preferences may be permitted by the chartering authority on an individual school basis and only if consistent with the law.</td>
<td>Petition includes a statement that if the number of pupils who wish to attend the charter school exceeds the school's capacity, attendance, except for existing pupils of the charter school, shall be determined by a public random drawing as described in (B).</td>
<td>Page(s)</td>
</tr>
<tr>
<td><strong>NOTIFICATION TO DISTRICT FOR STUDENT LEAVING CHARTER SCHOOL</strong></td>
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<tr>
<td>Notice to school district: Student status</td>
<td>35.</td>
<td>47605(d)(3)</td>
<td>If 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. This paragraph applies only to pupils subject to compulsory full-time education pursuant to 48200.</td>
<td>Statements that if a pupil is expelled or leaves the charter school without graduating or completing the school year for any reason, the charter school shall</td>
<td>Page(s)</td>
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# Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

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<tr>
<td>47605(g) INFORMATION REGARDING PROPOSED OPERATION</td>
<td>36.</td>
<td>47605(g) The LEA governing board shall require that the petitioner(s) provide information regarding the proposed operation and potential effects of the school, including, but not limited to:</td>
<td>Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard.</td>
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<td>Standard Met</td>
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<tr>
<td></td>
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<td>□ The facilities to be used by the school</td>
<td></td>
<td>Yes No Partial</td>
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<td>□ The manner in which administrative services of the school are to be provided</td>
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<td>□ Potential civil liability effects, if any, upon the school and upon the district</td>
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<td></td>
<td></td>
<td>□ Description of facilities to be used by the charter</td>
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<td>□ Specify where the school intends to locate</td>
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<td>The petitioner(s) shall also be required to provide financial statements that include a proposed 1st year operational budget, including:</td>
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<td>□ Start-up costs</td>
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<td></td>
<td></td>
<td>□ Cash-flow and financial projections for the first 3 years of operation.</td>
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<tr>
<td>47605(h) Preference to be given to petitions that focus on academically low achieving students</td>
<td>37.</td>
<td>47605(h) In reviewing petitions for the establishment of charter schools within the school district, the school district governing board shall give preference to petitions that demonstrate the capability to provide comprehensive learning experiences to pupils identified by the petitioner or petitioners as academically low achieving pursuant to the standards established by the (charter schools) department under Section 54032.</td>
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<td>Page(s)</td>
<td>Standard Met</td>
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<tr>
<td></td>
<td></td>
<td>Petition provides a detailed description of how the charter school will identify and respond to the needs of pupils who are not achieving at or above expected levels.</td>
<td></td>
<td>Yes No Partial</td>
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<tr>
<td>47605(l) Certification of charter school teachers; core and noncore courses</td>
<td>38.</td>
<td>47605(l) Teachers in charter schools shall hold a Commission on Teacher Credentialing certificate, permit, or other document equivalent to that which a teacher in other public schools would be required to hold. These documents shall be maintained on file at the charter school and are subject to periodic inspection by the chartering authority. It is the intent of the Legislature that a charter schools be given flexibility with regard to noncore, non-college preparatory courses.</td>
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<td>Standard Met</td>
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<tr>
<td></td>
<td></td>
<td>□ Copies of valid credentials held by teachers assigned to core and college prep classes.</td>
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<td>Yes No Partial</td>
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<td></td>
<td></td>
<td>□ Description of qualifications for teachers of non-core, non-college prep classes who are not credentialed.</td>
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</tbody>
</table>
# Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

| Requirement | Item | *Ed Code Reference*  
(Required Elements) | **Evaluation Guidance** Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard. | Located on Page(s) | Evaluation Circle One: Yes, No or Partial |
|-------------|------|-----------------|--------------------------------------------------------------------------------|-----------------|---------------------------------------|
| 47605(b)(1) | “The charter presents an unsound educational program for the pupils enrolled in the school” | 47605(b)(1) \*The charter presents an unsound educational program for the pupils enrolled in the school \*
| 5 CCR 11967.5.1 (f)(1) | The description of the educational program of the school as required by Education Code, at a minimum: | (f)(1) Specifies the charter school’s special education plan, including, but not limited to, the means by which the charter school will comply with the provisions of EC47641, the process to be used to identify students who qualify for special education programs and services, how the school will provide or access special education programs and services, the school’s understanding of its responsibilities under law for special ed. pupils, and how the school intends to meet those responsibilities. |
| **SERVICES TO STUDENTS WITH DISABILITIES** | | | | |
| Special Education students to be provided with services as in all public schools. | | | | |
| 39. | 56145 | Individuals with exceptional needs attending charter schools pursuant to Part 26.8 (commencing with Section 47600) shall be served in the same manner as individuals with exceptional needs are served in other public schools. | Petition provides that: - All eligible students enrolled in the charter school will receive appropriate special education services in accordance with applicable state and federal law and the SELPA Local Plan for Special Education. - No student “otherwise eligible to enroll in the charter school” will be denied enrollment due to a disability or to the charter school’s inability to provide necessary services. - Staff members providing special education services are appropriately credentialed - Any facility used by the school does not present physical barriers that would limit an eligible student’s full participation in the educational and extracurricular programs. - The charter school will assume full responsibility for appropriate accommodation to address the needs of any student. - The responsibility of the school to provide special education, instruction and related services to the students enrolled in the school regardless of students’ district of residence | | |
| Implementation of Section 504 of the Rehabilitation Act | 40. | “Under Section 504 and Title II, students with disabilities enrolled in public schools, including your charter school, are entitled to a free appropriate public education (FAPE). The Section 504 regulation includes several substantive and procedural requirements regarding the provision of FAPE. Among these requirements is that a student with a disability must receive appropriate regular or special education and related aids and services. The requirement is designed so that the individual educational needs of the disabled student are met as adequately as the needs of nondisabled students.” | Petition provides: - All eligible students enrolled in the charter school will receive appropriate accommodations and modifications consistent with Section 504 of the Rehabilitation Act - No student “otherwise eligible to enroll in the charter school” will be denied enrollment due to a disability or to the charter school’s inability to provide necessary services. - Staff members providing services to the student are familiar with the identified needs of the student - Any facility used by the school does not present physical barriers that would limit an eligible student’s full participation in the educational and extracurricular programs. - The charter school will assume full responsibility for appropriate accommodation to address the needs of any student. - The responsibility of the school to provide accommodations, modifications and services to the student regardless of the student’s district of residence | | |
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<tr>
<td>SERVICES TO STUDENTS WHO ARE LIMITED ENGLISH-PROFICIENT</td>
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</table>
| Reference: U.S. Department of Education Publication: APPLYING FEDERAL CIVIL RIGHTS LAWS TO PUBLIC CHARTER SCHOOLS | 41. | Federal civil rights law requires that public schools provide LEP children appropriate services designed to teach English and the general curriculum. | Petition provides:  
- All eligible students enrolled in the charter school will receive appropriate English Learner services in accordance with applicable state and federal law.  
- Staff members providing English Learner Services are appropriately credentialed.  
- A description of the manner in which students are identified as requiring English Learner Services  
- A description of the process for reclassification of English Learners  
- An acknowledgment of the responsibility of the charter school to provide access to grade-level core curriculum for English Learners. (Check for reference to the use of California English-language Development Standards.)  
- References to curriculum and materials that will be utilized in the instruction of English Learners.  
- Petition tells how English Learners will be reclassified. English Learners will be monitored | | |
| INDEPENDENT STUDY | | | | | | | |
| Annual Audit | 42. | 47612.5(b). (b) Notwithstanding any other provision of law and except to the extent inconsistent with this section and Section 47634.2, a charter school that provides independent study shall comply with Article 5.5 (commencing with Section 51745) of Chapter 5 of Part 28 and implementing regulations adopted thereunder. | The petition verifies that the K-12 public school guidelines of independent study will be evident in the annual audit. | | |
| Ratio of ADA to FTE | 43. | 51745.6. (a) The ratio of average daily attendance for independent study pupils 18 years of age or less to school district full-time equivalent certificated employees responsible for independent study, calculated as specified by the State Department of Education, shall not exceed the equivalent ratio of pupils to full-time certificated employees for all other educational programs operated by the school district. The pupils-to-certificated-employee ratio described in subdivision (a) may, in a charter school, be calculated by using a fixed pupils-to-certificated-employee ratio of 25 to one, or by being a ratio of less than 25 pupils per certificated employee. All charter school pupils, regardless of age, shall be included in pupil-to-certificated-employee ratio calculations. The computation of those ratios shall be performed annually by the reporting agency at the time of, and in connection with, the second principal apportionment report to the Superintendent of Public Instruction. | The petition states that it will meet the requirement related to the ratio of ADA to FTE as described in EC 51745.6. | | |


## Charter Petition Review Matrix

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<tr>
<td>Written Policies to receive apportionments</td>
<td>44.</td>
<td>51747. … shall not be eligible to receive apportionments for independent study by pupils, regardless of age, unless it has adopted written policies, and has implemented those policies, pursuant to rules and regulations adopted by the Superintendent of Public Instruction, that include, but are not limited to, all of the following:</td>
<td>Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard.</td>
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<td>(a) The maximum length of time, by grade level and type of program, that may elapse between the time an independent study assignment is made and the date by which the pupil must complete the assigned work.</td>
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<td>(b) The number of missed assignments that will be allowed before an evaluation is conducted to determine whether it is in the best interests of the pupil to remain in independent study, or whether he or she should return to the regular school program. - A written record of the findings of any evaluation made pursuant to this subdivision shall be treated as a mandatory interim pupil record. The record shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school.</td>
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<td>(c) A requirement that a current written agreement for each independent study pupil shall be maintained on file including, but not limited to, all of the following:</td>
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<td></td>
<td></td>
<td>(1) The manner, time, frequency, and place for submitting a pupil's assignments and for reporting his or her progress.</td>
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<td></td>
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<td>(2) The objectives and methods of study for the pupil's work, and the methods utilized to evaluate that work.</td>
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<td>(3) The specific resources, including materials and personnel, that will be made available to the pupil</td>
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<td>(4) A statement of the policies adopted pursuant to subdivisions (a) and (b) regarding the maximum length of time allowed between assignment and the completion of a pupil's assigned work, and the number of missed assignments allowed prior to an evaluation of whether or not the pupil should be allowed to continue in independent study.</td>
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<td>(5) Duration of independent study agreement, including beginning and ending dates for the pupil's participation in independent study under the agreement. No independent study shall be valid for any period longer than one semester.</td>
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<td>(6) A statement of the number of course credits or, for elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.</td>
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<td>(7) Inclusion of a statement that Independent study is an optional educational alternative in which no pupil may be required to participate.</td>
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<td>(8) Each agreement shall be signed, prior to commencement of independent study, by pupil, pupil's parent/guardian/or caregiver, certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil.</td>
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</tbody>
</table>
# Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Item</th>
<th>Ed Code Reference (Required Elements)</th>
<th>Evaluation Guidance</th>
<th>Located on Page(s)</th>
<th>Evaluation Circle One: Yes, No or Partial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervised by credentialed teacher</td>
<td>45.</td>
<td>5174. (a) The independent study by each pupil or student shall be coordinated, evaluated, and, notwithstanding subdivision (a) of Section 46300, shall be under the general supervision of an employee of the school district or county office of education who possesses a valid certification document pursuant to Section 44865 or an emergency credential pursuant to Section 44300, registered as required by law. (b) School districts and county offices of education may claim apportionment credit for independent study only to the extent of the time value of pupil or student work products, as personally judged in each instance by a certificated teacher. Petition ensures all independent study shall be supervised by a credentialed teacher.</td>
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</tbody>
</table>

**LOCAL CONTROL ACCOUNTABILITY PLAN (LCAP)**

<table>
<thead>
<tr>
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<tr>
<td></td>
<td>46.</td>
<td>47606.5. (a) On or before July 1, 2015, and each year thereafter, a charter school shall update the goals and annual actions to achieve those goals identified in the charter pursuant to subparagraph (A) of paragraph (5) of subdivision (b) of Section 47605 or subparagraph (A) of paragraph (5) of subdivision (b) of Section 47605.6. [Description of the Educational Program] The annual update shall be developed using the template adopted pursuant to Section 52064 and shall include all of the following:</td>
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<td></td>
<td></td>
<td>☐ (1) A review of the progress toward the goals included in the charter, an assessment of the effectiveness of the specific actions described in the charter toward achieving the goals, and a description of changes to the specific actions the charter school will make as a result of the review and assessment.</td>
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<td></td>
<td></td>
<td>☐ (2) A listing and description of the expenditures for the fiscal year implementing the specific actions included in the charter as a result of the reviews and assessment required by paragraph (1).</td>
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<td></td>
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<td>☐ (b) The expenditures identified in subdivision (a) shall be classified using the California School Accounting Manual pursuant to Section 41010.</td>
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<td>☐ (c) For purposes of the review required by subdivision (a), a governing body of a charter school may consider qualitative information, including, but not limited to, findings that result from school quality reviews conducted pursuant to subdivision (J) or paragraph (4) of subdivision (a) of Section 52052* or any other reviews.</td>
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<td>☐ (d) To the extent practicable, data reported pursuant to this section shall be reported in a manner consistent with how information is reported on a school accountability report card.</td>
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<tr>
<td></td>
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<td>☐ (e) The charter school shall consult with teachers, principals, administrators, other school personnel, parents, and pupils in developing the annual update.</td>
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</tbody>
</table>
## Charter Petition Review Matrix

For a Petition Submitted Pursuant to California Education Code 47605, 47605.5, 47607

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<tr>
<td><strong>Renewals and Material Revisions</strong></td>
<td>47.</td>
<td>47607(a)(2) Renewals and material revisions of charters are governed by the standards and criteria in Section 47605, and shall include, but not be limited to:</td>
<td>Provided for review guidance purposes only. Based, in part, on 5 CCR 11967.5.1 describing how the State Board will review a charter application. This is NOT a checklist of required items, but a reference for review of the standard.</td>
<td></td>
<td>Standard Met</td>
</tr>
<tr>
<td></td>
<td></td>
<td>☐ Reasonably comprehensive description of any new requirement of charter schools enacted into law after the charter was originally granted or last renewed.</td>
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<td></td>
<td>Yes</td>
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<tr>
<td><strong>Student Achievement Most Important Factor</strong></td>
<td>48.</td>
<td>47607(a)(3)(A) The authority that granted the charter shall consider increases in pupil academic achievement for all groups of pupils served by the charter school as the most important factor in determining whether to grant a charter renewal.</td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td><strong>Renewal Minimum Standards</strong></td>
<td>49.</td>
<td>47607(b)...after a charter school has been in operation for 4 years...shall met at least one of the following:</td>
<td></td>
<td></td>
<td>Partial</td>
</tr>
<tr>
<td></td>
<td></td>
<td>☐ (1) Attained its Academic Performance Index (API) growth target in the prior year or in two of the last three years both school wide and for all groups of pupils served by the school.</td>
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<td></td>
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<td>☐ (2) Ranked in deciles 4 to 10, inclusive on the API in the prior year or in two of the last three years.</td>
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<td>☐ (3) Ranked in deciles 4 to 10, inclusive, on the API for a demographically comparable school in the prior year</td>
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<td>☐ 4(A) Academic performance of school is at least equal to the academic performance of the public schools that the charter school pupils would otherwise have been required to attend, as well as the academic performance of the schools in the school district in which the charter school is located, taking into account the composition of the pupil population served by the School.</td>
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<td><strong>Criteria evaluating minimum standards</strong></td>
<td>50.</td>
<td>47607(b)(4)(B) The determination made...shall be based upon all of the following:</td>
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<td>☐ (i) Documented and clear and convincing data.</td>
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<td>☐ (ii) Pupil achievement data</td>
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<td></td>
<td></td>
<td>☐ (iii) Information submitted by charter school</td>
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<tr>
<td><strong>30 days requirement</strong></td>
<td>51.</td>
<td>47607(b)(4)(D) A charter renewal may not be granted to charter prior to 30 days after the charter school submits materials pursuant to this paragraph.</td>
<td></td>
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</tbody>
</table>