



# MONTEREY COUNTY OFFICE OF EDUCATION

## CHARTER SCHOOL PETITION INTERNAL APPEAL REVIEW CHECKLIST

Proposed Charter School: \_\_\_\_\_

Proposed Location: \_\_\_\_\_

Petitioner Contact Information	Denial Information	Petition Review and Presentation Timelines (Office Use Only)		
<b>Name</b>	District Denying Petition:	<b>Petition Presented to MCOE</b> <small>(Maximum of 180 days from denial)</small>	<b>Public Hearing</b> <small>(30 days from receipt)</small>	<b>Decision by Board of Education</b> <small>(60 days from receipt, may be extended 30 days if agreed by petitioner(s) and MCOE)</small>
<b>Phone</b>				
<b>Address</b>	Date of Board Action:	Date	Date Due	Date Due:
<b>Email</b>		_____	_____	<input type="checkbox"/> 30 day extension to:
			Date Held	Date of Board Decision:
			_____	

**Section below is for Office Use ONLY**

Area of Review	Department(s) Responsible	Name of Reviewer
1. Education Program	Education Services	
2. Measurable Student Outcomes	Education Services	
3. Student Progress Measurement	Education Services	
4. Government Structure	Compliance	
5. Employee Qualifications	Human Resources (reviewed by ALL)	
6. Health and Safety	Compliance	
7. Racial & Ethnic Balance	Education Services & Compliance (reviewed by ALL)	
8. Admissions Requirements	Compliance (reviewed by ALL)	
9. Annual Financial Audits	Business Services	
10. Suspension and Expulsion	Compliance (reviewed by ALL)	
11. Staff Retirement System	Human Resources & Business Services	
12. Attendance Alternatives	Compliance	
13. Description of Employee Rights	Human Resources (reviewed by ALL)	
14. Dispute Resolution Process	Compliance & Business Services	
15. Labor Relations	Human Resources (reviewed by ALL)	
16. Closure Procedures	Business Services	
<b>Supplemental Information</b>		
Financial Plan	Business Services	
Impact Statement	Reviewed by ALL	
Facilities	Business Services	
Special Education	Education Services & Special Education	
Independent Study (if applicable)	Education Services	

Charter Petition Name: \_\_\_\_\_

Complete Petition Received: \_\_\_\_\_

**Instructions to Petitioner and Reviewer:** This checklist is designed to guide the review of charter school petitions. Throughout the evaluation, the petition review team will rate the petitioner’s response as **Meets** or **Fails to Meet** the criteria required for each specific area. The review of the petition by the staff will indicate the extent to which the required standards are met:

- ✓ = Meets requirement
- + = Exceeds requirement
- = Minimally meets requirement and may be addressed in the MOU.

Please write the page number where the information for each Evaluation Criteria can be located in the “found on page” column of the matrix document. Include a copy of this completed document with your charter petitions.

Found on page:	Evaluation Criteria (1) EDUCATIONAL PROGRAM	Meets Required Standard	Fails To Meet Required Standard
	◆ Age, grade levels and number of students		
	□ Describe students whom the charter will attempt to educate		
	◆ School year, academic calendar, number of school day and instructional minutes		
	◆ Attendance expectations and requirements		
	□ Objective of enabling pupils to become self-motivated, competent, lifelong learners		
	◆ Clear list of general academic skills and qualities important for an educated person		
	◆ Clear list of general non-academic skills and qualities important for an educated person		
	◆ Persuasive instructional design		
	◆ Broad outline (not entire scope and sequence) of the curriculum content		
	◆ Description of instructional approaches and strategies		
	◆ Description of learning setting (e.g. traditional, home-based, distance learning, etc.)		
	◆ Proposed program strongly aligned to school's mission		
	◆ Affirmation that, or description of, how curriculum aligned to California Content Standards		
	◆ Outlines a plan or strategy to support students not meeting pupil outcomes		
	◆ Instructional design or strategies based upon successful practice or research		
	◆ Describes instructional strategies for special education, Insufficient English proficient students, etc.		
	□ Annual goals, and annual actions to achieve those goals, for all pupils and for each subgroup of pupils (anticipated racial/ethnic subgroups, socioeconomically disadvantaged students, English learners, students with disabilities, and foster youth) to be achieved in the state priority areas that apply for the grade levels served, or the nature of the program operated, by the charter school: <ul style="list-style-type: none"> <li>◆ Student achievement</li> <li>◆ Student engagement</li> <li>◆ Other student outcomes</li> </ul>		

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<ul style="list-style-type: none"> <li>◆ School climate</li> <li>◆ Parental involvement</li> <li>◆ Basic services (teacher credentials, instructional materials, facilities)</li> <li>◆ Implementation of common core state standards</li> <li>◆ Course access</li> <li>◆ Additional school priorities, goals specific annual actions</li> </ul>		
<input type="checkbox"/> How Charter School will inform parents about the transferability of courses to other public high schools		
<input type="checkbox"/> How Charter School will inform parents about the eligibility of courses to meet college entrance requirements		

**If Fails to Meet Standard, include Concerns and/or Additional Questions:**

Found on page:	Evaluation Criteria (2) MEASURABLE OUTCOMES	Meets Required Standard	Fails To Meet Required Standard
<input type="checkbox"/>	<b>Pupil outcomes are measurable, i.e. specific assessments listed for each exit outcome, aligned with state priorities and goals in Educational Program</b>		
	◆ How pupil outcomes will address state content and performance standards in core academics		
	◆ Outcomes align with common core state standards		
	◆ Outcomes and measures align with state priorities and goals identified in Educational Program		
	◆ Lists school-wide student performance goals students will achieve over a given period of time: Projected attendance levels, dropout percentage, graduation rate goals, etc.		
	◆ Describes academic achievement outcomes both Schoolwide and for all groups of pupils (anticipated racial/ethnic subgroups, socioeconomically disadvantaged students, English learners, students with disabilities, and foster youth)		
	◆ Clearly stated exit outcomes include acquisition of academic and non-academic skills, that are specific, measurable and rigorous		
	◆ Acknowledges that exit outcomes and performance goals may need to be modified over time		
	◆ Affirmation that "benchmark" skills and specific classroom-level skills will be developed		
	◆ Affirmation/description that exit outcomes will align to mission, curriculum and assessments		
	◆ 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		
	◆ If high school, graduation requirements defined and WASC accreditation addressed		

**If Fails to Meet Standard, include Concerns and/or Additional Questions:**

Found on page:	Evaluation Criteria (3) STUDENT PROGRESS MEASUREMENT	Meets Required Standard	Fails To Meet Required Standard
<input type="checkbox"/>	Assessments include multiple, valid and reliable measures using traditional/alternative tools		
<input type="checkbox"/>	Assessment tools include all required state and federal assessments (STAR, API, and		

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	AYP)		
◆	At least one assessment method or tool listed for each of the exit outcomes		
◆	Chosen assessments are appropriate for standards and skills they seek to measure		
◆	Affirmation/description of how assessments align to mission, exit outcomes, and curriculum		
◆	Describes minimal required performance level necessary to attain each standard		
◆	Outlines plan for collecting, analyzing/utilizing and reporting student/school performance		
◆	Consistent with the way information is reported on the School Accountability Report Card		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (4) GOVERNMENT STRUCTURE	Meets Required Standard	Fails To Meet Required Standard
<input type="checkbox"/>	Describes what role parents have in the governance and operation of the school		
<input type="checkbox"/>	Describes key features of governing structure (usually a board of directors) such as: <ul style="list-style-type: none"> <li>▪ Compliance with Brown Act, Public Records Act and Conflict of Interest Policy</li> <li>▪ Size/composition of board, board committees and/or advisory councils</li> <li>▪ Board's scope of authority/responsibility</li> <li>▪ Method for selecting initial board members</li> <li>▪ Board election/appointment and replacement</li> </ul>		
◆	Affirms future development of, or has set of, proposed bylaws, policies or similar documents		
◆	Initial governing board members identified by name or the process to be used to select them		
◆	Clear description of the legal status of the charter school		
◆	Outlines other important legal or operational relationships between school and granting agency		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (5) EMPLOYEE QUALIFICATIONS	Meets Required Standard	Fails To Meet Required Standard
<input type="checkbox"/>	Identifies all key staff positions with the school		
<input type="checkbox"/>	Describes specific key qualifications (knowledge, experience, education, certification)		
<input type="checkbox"/>	Defines core, college preparatory teachers & affirms they will hold appropriate Commission on Teacher Credentialing certificate, permit or other equivalent document as required by Law including the No Child Left Behind Act.		
◆	Identifies any non-core, non-college prep teaching positions staffed by non-certified teachers, along with required qualifications.		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found	Evaluation Criteria	Meets	Fails To Meet
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on page:	(6) HEALTH AND SAFETY	Required Standard	Required Standard
◆	Affirms that each employee will furnish the school with a criminal record summary		
	<ul style="list-style-type: none"> <li>▪ Seismic safety (structural integrity and earthquake preparedness)</li> <li>▪ Natural disasters and emergencies</li> <li>▪ Immunizations, health screenings, administration of medications</li> <li>▪ Tolerance for use of drugs and/or tobacco</li> <li>▪ Staff training on emergency and first aid response</li> <li>▪ 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 MCOE</li> </ul>		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (7) RACIAL AND ETHNIC BALANCE	Meets Required Standard	Fails To Meet Required Standard
◆	Lists specific practices/policies designed to attract a diverse applicant pool/enrollment		
	<ul style="list-style-type: none"> <li>▪ Includes specific language access policy for attracting and achieving targeted racial and ethnic balance</li> </ul>		
□	Practices and policies appear likely to achieve targeted racial and ethnic balance		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (8) ADMISSION REQUIREMENTS	Meets Required Standard	Fails To Meet Required Standard
□	Mandatory assurances regarding non-discriminatory admission procedures		
◆	Admission preferences which are required for conversion charter schools, if applicable		
◆	Clearly describes admissions requirements, including any preferences		
◆	Proposed admissions and enrollment process and timeline, as well as procedures for public random drawings, if necessary		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (9) ANNUAL FINANCIAL AUDITS	Meets Required Standard	Fails To Meet Required Standard
□	Procedure to select and retain independent auditor		
◆	Qualifications of independent auditor		
□	Audit will employ generally accepted accounting procedures		
□	The manner in which the audit will be conducted		
◆	Scope and timing of audit, as well as required distribution of completed audit		
□	Process for resolving audit exceptions and deficiencies to the satisfaction of the Monterey County Office of Education		

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If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria <b>(10) SUSPENSION AND EXPULSION</b>	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> Detailed, step-by-step process by which student may be suspended or expelled		
	◆ Reference to a comprehensive set of student disciplinary policies		
	◆ Reference homework policy for students suspended less than 5 days		
	<input type="checkbox"/> Describe the expulsion appeal process		
	<input type="checkbox"/> Outlines or describes strong understanding of relevant laws protecting constitutional rights of students, generally, and of disabled and other protected classes of students		
	◆ Policies balance students' rights to due process with responsibility to maintain a safe learning environment		
	◆ Explains how MCOE may be involved in disciplinary matters		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria <b>(11) STAFF RETIREMENT SYSTEM</b>	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> Statement of whether staff will participate in STRS, PERS, or Social Security (if STRS, then all teachers must participate)		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria <b>(12) ATTENDANCE ALTERNATIVES</b>	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> States that students may attend other schools or pursue an inter-district transfer in accordance with existing enrollment and transfer policies of their district or county of residence and/or description of other attendance alternatives		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria <b>(13) DESCRIPTION OF EMPLOYEE RIGHTS</b>	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> States that collective bargaining contracts of MCOE will be controlling		
	◆ Whether and how staff may resume employment within the district or MCOE, if applicable		
	◆ Sick/vacation leave (ability to carry it over to and from charter school, if applicable)		
	◆ Whether staff will continue to earn service credit (tenure) in district or MCOE while at charter school, if applicable		

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If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (14) DISPUTE RESOLUTION PROCESS	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> Outlines a simple process for the charter school and the Monterey County Office of Education to settle disputes relating to the provisions of the charter		
	◆ Outlines process by charter school will resolve internal complaints and disputes		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (15) LABOR RELATIONS	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> States whether charter or MCOE will be employer for EERA purposes		
	◆ If Monterey County Office of Education is to be the employer, includes provisions clarifying charter's role in collective bargaining process		

If Fails to Meet Standard, include Concerns and/or Additional Questions:

Found on page:	Evaluation Criteria (16) CLOSURE PROCEDURES	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> Outlines a description of the process to be used if the charter school closes		
	<input type="checkbox"/> 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		

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Evaluation Criteria	Meets Required Standard	Fails To Meet Required Standard
<ul style="list-style-type: none"> <li>◆ 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.</li> </ul>		

## REQUIRED SUPPLEMENTAL INFORMATION

Found on page:	Evaluation Criteria <b>FINANCIAL PLAN</b>	Meets Required Standard	Fails To Meet Required Standard
	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Proposed first year operational budget</b> <ul style="list-style-type: none"> <li>• Start-up costs</li> <li>• Cash flow for first three years</li> <li>• Financial projections for first three years</li> </ul> </li> <li>◆ <b>Planning Assumptions</b> <ul style="list-style-type: none"> <li>▪ Number/types of students</li> <li>▪ Number of staff</li> <li>▪ Facilities needs</li> <li>▪ Costs of all major items are identified and within reasonable market ranges</li> <li>▪ Revenue assumptions in line with state and federal funding guidelines</li> <li>▪ Revenue from “soft” sources less than 10% of ongoing operational costs</li> <li>▪ Timeline allows window for referenced grant applications to be submitted and funded</li> </ul> </li> </ul>		

**If Fails to Meet Standard, include Concerns and/or Additional Questions:**

Found on page:	Evaluation Criteria <b>FINANCIAL PLAN</b>	Meets Required Standard	Fails To Meet Required Standard
	<ul style="list-style-type: none"> <li>▪ Clearly identifies all major start-up costs               <ul style="list-style-type: none"> <li><input type="checkbox"/> Staffing</li> <li><input type="checkbox"/> Facilities</li> <li><input type="checkbox"/> Equipment and Supplies</li> <li><input type="checkbox"/> Professional Services</li> </ul> </li> <li>▪ Assumptions in line with overall school design plan</li> <li>▪ Identifies potential funding source</li> <li>▪ Timeline allows for grant and fundraising</li> </ul>		

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Found on page:	Evaluation Criteria FINANCIAL PLAN	Meets Required Standard	Fails To Meet Required Standard
	<ul style="list-style-type: none"> <li>▪ Annual revenues and expenditures clearly identified by source</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Revenue assumptions closely related to applicable state and federal funding formulas</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Expenditure assumptions reflect school design plan</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Expenditure assumptions reflect market costs</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ "Soft" revenues not critical to solvency</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Strong reserve or projected ending balance (the larger of 3% of expenditure or \$25,000)</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ 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</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Expenditure for sufficient insurance to name district as also insured/hold harmless agreement</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Expenditure sufficient for reasonably expected legal services</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Expenditure for Special Education excess costs consistent with current experience in the school district/county</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Expenditure for facilities – if specific facilities not secured, reasonable projected cost</li> </ul>		

**If Fails to Meet Standard, include Concerns and/or Additional Questions:**

Found on page:	Evaluation Criteria FINANCIAL PLAN	Meets Required Standard	Fails To Meet Required Standard
	<ul style="list-style-type: none"> <li>▪ Monthly projection of revenue receipts in line with local/state/federal funding disbursements</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Expenditures projected by month and correspond with typical/reasonable schedules</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Show positive cash balance each month and/or identify sources of working capital</li> </ul>		

**If Fails to Meet Standard, include Concerns and/or Additional Questions:**

Found on page:	Evaluation Criteria FINANCIAL PLAN	Meets Required Standard	Fails To Meet Required Standard
	<ul style="list-style-type: none"> <li>▪ Projects revenues and expenditures for at least two additional years</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Revenue assumptions based on reasonable potential growth in local, state and federal revenues</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Revenue assumptions based on reasonable student growth projections</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Reasonable cost-of-living and inflation/funding reduction assumptions</li> </ul>		
	<ul style="list-style-type: none"> <li>▪ Annual fund balances are positive or sources of supplemental working capital are identified</li> </ul>		

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Found on page:	Evaluation Criteria IMPACT STATEMENT	Meets Required Standard	Fails To Meet Required Standard
◆	Provides estimated numbers of students anticipated to enroll		
◆	Identifies whether charter will request to purchase support services from MCOE or district		
◆	Describes suggested processes and policies between charter and MCOE including:		
	▪ Process, activities and associated fees for oversight of charter		
	▪ Content, processes, timelines, and evaluation criteria for annual review and site visits		
	▪ Regular, ongoing fiscal and programmatic performance monitoring and reporting		
	▪ Content, process, timelines and evaluation criteria for charter renewal		
◆	Proposed support service needs and suggested payments to MCOE or district for services		
	▪ Clearly drafted contract/agreement or reference to MOU		
○	Identify whether a request will be made for use of MCOE or district-owned facilities		
○	Reasonably detailed lease or occupation agreement for privately obtained facilities		
◆	Proposed legal status of school is identified		
□	Describes the manner in which administrative services of the charter school are to be provided		
◆	Identify whether school intends to manage risk independently or will seek to secure coverage through the Monterey County Office of Education or other public agency		
□	Addresses potential civil liability effects, if any, upon the school and the MCOE		

**If Fails to Meet Standard, include Concerns and/or Additional Questions:**

Found on page:	Evaluation Criteria FACILITIES	Meets Required Standard	Fails To Meet Required Standard
□	Describe the types and potential location of facilities needed to operate the size and scope of educational program proposed in the charter.		
□	In the event 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.		
□	Are reasonable costs for the acquisition or leasing of facilities to house the charter school reflected in budget (taking into account the facilities the charter school may be allocated under the provisions of Education Code section 47614)		

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Found on page:	Evaluation Criteria SPECIAL EDUCATION	Meets Required Standard	Fails To Meet Required Standard
<input type="checkbox"/>	Petition specifies the means by which the charter school will comply with the provisions of Education Code section 47641		
<input type="checkbox"/>	Has consulted with a SELPA agency concerning Special Ed. Services		
<input type="checkbox"/>	Has contacted the special education director in district/LEA providing services <ul style="list-style-type: none"> <li>▪ Discussed special education responsibilities of charter</li> <li>▪ Discussed application of SELPA policies</li> </ul>		
<input type="checkbox"/>	Describes how special education services will be provided consistent with SELPA Plan and/or policies and procedures <ul style="list-style-type: none"> <li>▪ Includes fiscal allocation plan</li> </ul>		
<input type="checkbox"/>	Includes the process to be used to identify students who qualify for special education programs and services, including <ul style="list-style-type: none"> <li>▪ Referral</li> <li>▪ Assessment</li> <li>▪ Instruction</li> <li>▪ Due Process</li> <li>▪ Agreements describing allocation of actual and excess costs</li> <li>▪ Charter fiscally responsible for fair share of any encroachment on general funds</li> </ul>		
<input type="checkbox"/>	The school's understanding of its responsibilities under law for special education pupils, and how the school intends to meet those responsibilities		

Found on page:	Evaluation Criteria SPECIAL EDUCATION	Meets Required Standard	Fails To Meet Required Standard
<input type="checkbox"/>	Notifies SELPA Director of intent prior to February 1 <sup>st</sup> of the preceding school year		
<input type="checkbox"/>	Provides current operating budget in accordance with Ed Code 42130 and 42131		
<input type="checkbox"/>	Responsible for any legal fees relating to application and assurances process		
<input type="checkbox"/>	Meets the terms of the "Agreement Regarding the Organization, Implementation, Administration and Operation of SELPA"		
<input type="checkbox"/>	Assurance Statement that Charter is fiscally responsible for fair share of any encroachment on general funds		
<input type="checkbox"/>	The charter will comply with all provisions of IDEA		
<input type="checkbox"/>	No student will be denied admission based on disability or lack of available services		
<input type="checkbox"/>	Will implement a Student Study Team process		
<input type="checkbox"/>	Any student potentially in need of Section 504 services will be the responsibility of the charter school		
<input type="checkbox"/>	Petition/MOU describes the process for notifying district of residence and authorizing school district when a special education student enrolls, becomes eligible, ineligible and/or leaves charter school <ul style="list-style-type: none"> <li>▪ Charter School</li> <li>▪ Monterey County Office of Education</li> <li>▪ SELPA</li> </ul>		
<input type="checkbox"/>	Petition/MOU describes the transition to or from a district when a student with an IEP enrolls in, or transfers out of, the charter school		

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**INDEPENDENT STUDY | Requirements in this section apply to petitions proposing to utilize a non-classroom based instructional strategy in the charter school.**

Found on page:	Evaluation Criteria	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> <b>The petition verifies that the K-12 public school guidelines for independent study will be evident in the annual audit.</b> <b>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 there-under.		
	<input type="checkbox"/> <b>The petition states that it will meet the requirement related to the ratio of ADA to FTE certificated employees as prescribed under education code 51745.6(a).</b> 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 education programs operated by the school district. The ratio of average daily attendance for independent study pupils 18 years of age or less to county office of education fulltime equivalent employees responsible for independent study, to be calculated in a manner prescribed 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 high school or unified school district with the largest daily attendance of pupils in that county. The computation of those ratios.		
	<input type="checkbox"/> 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.		
	<input type="checkbox"/> 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.		
	<input type="checkbox"/> The requirement that a current written agreement for each pupil will be maintained in file, at a minimum, the following areas:		
	<input type="checkbox"/> The manner, time, frequency, and place for submitting a pupil's assignments and for reporting his or her progress.		
	<input type="checkbox"/> The objectives and methods of study for the pupil's work, and the methods utilized to evaluate that work.		
	<input type="checkbox"/> The specific resources, including materials and personnel that will be made available to the pupil.		
Found on page:	Evaluation Criteria	Meets Required Standard	Fails To Meet Required Standard
	<input type="checkbox"/> A statement of the policies adopted pursuant to subdivisions (a) and (b) regarding the maximum length of time allowed between the assignment and the completion of a pupil's assigned work, and the number of missed assignments allowed prior to an evaluation of whether or not the pupil should be allowed to continue in independent study.		
	<input type="checkbox"/> The duration of the independent study agreement, including the beginning and ending dates for the pupil's participation in independent study under		

**Legend:**

- Required to be included in charter petition and/or Memorandum of Understanding*
- ◆ *Strongly suggested to ensure that charter elements are reasonably comprehensive*

revised 5.13.15

Charter Petition Name: \_\_\_\_\_

Complete Petition Received: \_\_\_\_\_

	the agreement. No independent study agreement shall be valid for any period longer than one semester, or one-half year for a school on a year-round calendar.		
	<input type="checkbox"/> A statement of the number of course credits, or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the pupil upon completion.		
	<input type="checkbox"/> The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no pupil may be required to participate.		
	<input type="checkbox"/> Each written agreement shall be signed, prior to the commencement of independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and all persons who have direct responsibility for providing assistance to the pupil.		
	<input type="checkbox"/> <b>Petition acknowledges that independent study will be supervised by an appropriately credentialed teacher per 51747.5(a)</b>		
	<input type="checkbox"/> <b>Petition acknowledges that school may claim apportionment credit for independent study only to the extent of the time value of pupil or student work products, as personally judged in each instance by a certified teacher per 51747.5(b).</b>		

**If Fails to Meet Standard, include Concerns and/or Additional Questions:**

**Legend:**

- Required to be included in charter petition and/or Memorandum of Understanding*
- ◆ *Strongly suggested to ensure that charter elements are reasonably comprehensive*