Initial Charter Petition	☐
Charter Renewal	☐
On Appeal	☐

Education Code § 47605

Santa Clara County Office of Education

Jon R. Gundry, County Superintendent of Schools

CHARTER REVIEW MATRIX

Proposed Charter School	**Petitioner Contact Information**	**Petition Review Timeline**	
Name Charter School: **Wei Yu International Charter School**	Name: Jun Dong	**Petition Received:**	
Location of School(s): TBD	Title: Lead Petitioner	**Public Hearing:** (30 days from receipt)	
Grade Level(s): K-8	Phone/Cell: (408) 533-2518	**Board Decision:** (60 days from receipt)	
District of Proposed Charter School: Moreland School District	Email: ted.dong@gmail.com	☐ **30 day extension granted** (60 days from receipt, may be extended 30 days if agreed by petitioner(s) and SCCOE)	

OIS	**REQUIRED ELEMENTS: Education Code § 47605 (b) (1)-(5)**				
		Yes	**No**	**N/A**	**Page**
❒	The charter school presents a sound educational program?	☐	☐	☐	17-104, Appendix II-XII
❒	The petitioners are demonstrably unlikely to successfully implement the program?	☐	☐	☐	6-156, Appendix I-XII
❒	The petition contains an affirmation of each of the conditions described in Education Code § 47605(d) (1)?	☐	☐	☐	8-9
❒	The initial review finds that the petition has included all of the required elements (A-P)?	☐	☐	☐	17-149
OIS	**NOTIFICATION UPON APPROVAL: Education Code § 47605 (3) (i)**				
		Yes	**No**	**N/A**	**Page**
❒	The petition acknowledges that should the charter be granted, the petitioner will provide a written notice of the approval and a copy of the petition to: • The department (California Department of Education) • State Board of Education	☐	☐	☐	155
OIS	**REQUIRED PETITION SIGNATURES IF CONVERSION OF EXISTING PUBLIC SCHOOL: Education Code § 47605(a)**				
		Yes	**No**	**N/A**	**Page**
OIS	**REQUIRED PETITION SIGNATURES IF NOT CONVERSION OF EXISTING PUBLIC SCHOOL: Education Code § 47605(a)**				
• 50% of parents/guardians of number of students expected to attend		☐	☐	☐	Appendix XII
OR					
• 50% of the number of teachers expected to teach at the charter school during its 1st year		☐	☐	☐	N/A
OIS	**REQUIRED AFFIRMATIONS: Education Code § 47605(d)(1)**	**Yes**	**No**	**N/A**	**Page**
Statement that school will be non-sectarian in its programs, admission policies, employment practices, and all other operations, will not charge tuition, and will not discriminate against any pupil on the basis of ethnicity, national origin, gender or disability		☐	☐	☐	8

Instructions to Review Team: This checklist is designed to guide the review of charter school petitions.
Your comments are essential to understanding your assessment and will be used as part of the final analysis and report to the County Board.

Legend:

❒ *Required to be included in charter petition and/or Memorandum of Understanding.*

DETAILED REVIEW - REQUIRED ELEMENTS: Education Code § 47605(A-P)				
ESB	A. Educational Program	Evidence	Addressed in Petition	Page
❒	**1. Targeted School Populations**		☐	18-21
	Age, grade levels and number of students	☐		18
	• Number of students per class room	☐		35
	• Maximum enrollment predicted for school	☐		18
	Type of desired student populations	☐		18-21
	• States whether school will enroll students from outside the district (if submitted as an appeal previously denied by a district)	☐		8, 129-131
	• States whether school will enroll students from outside the county	☐		8, 129-131
❒	**2. Attendance**		☐	18
	• Describes whether multiple sites will be included	☐		151
	• Indicates proposed opening date(s)	☐		18
❒	Attendance requirements		☐	42-43
	• Includes length of school day and year	☐		42-43
	• Submit for approval the specific means to be used for student attendance accounting and reporting, satisfactory to support state average daily attendance claims and to satisfy audits related to attendance that may be conducted	☐		118
❒	**3. What it Means to be an Educated Person in the 21st Century**		☐	28-29
❒	Objective of enabling pupils to become self-motivated, competent, lifelong learners		☐	28-29
	Clear list of general academic skills and qualities important for an educated person	☐		28
❒	**4. Description of How Learning Best Occurs**		☐	29-56
	Persuasive instructional design	☐		32-42
	• Broad outline (not entire scope and sequence) of the curriculum content	☐	☐	46-56
	• Description of instructional approaches and strategies	☐		37-42
	• Description of learning environment (e.g. traditional, independent study)	☐		32-37
	Proposed program strongly aligned to school's mission	☐		46-56
	Affirmation or description of curriculum aligned to student performance standards	☐	☐	46-56
	Outline of plan or strategy to support students not meeting pupil outcomes	☐	☐	67-68
	Instructional design or strategies based upon successful practice or research	☐	☐	21-42, Appendix II-III
	Instructional strategies for special education, English learners, etc.	☐	☐	66-80
	Minimal instructional time	☐		42-43
	Includes school calendar	☐		Appendix V
❒	**5. Transitional Kindergarten program outlines developmentally appropriate learning outcomes, using modified curriculum, specialized instruction, and assessment for all students (Only if Charter offers Kindergarten)**		☐	N/A
❒	**6. English Learner Services**		☐	69-73
❒	All eligible students enrolled in the charter school will receive appropriate English Learner services in accordance with applicable state and federal law.		☐	69-73
❒	Staff members providing English Learner Services are appropriately credentialed.		☐	71
❒	A description of the manner in which students are identified as requiring English Learner Services		☐	70
❒	**A description of the process for reclassification of English Leaners**		☐	71
❒	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.)		☐	71-73
❒	References to curriculum and materials that will be utilized in the instruction of English Learners		☐	71-73
❒	Petition tells how English Learners will be reclassified and how English Learners will be monitored		☐	71-73
❒	**7. LCFF/LCAP Annual Goals and Annual Actions to Achieve Goals for Subgroups in EC 52052**		☐	58-66
❒	Charter includes language that assures compliance with LCFF/LCAP		☐	58
❒	Describes annual goals for all pupils and for each subgroup of pupils identified in EC 52052 to be achieved in each of the 8 state priorities, as described in EC 52060(d), that apply for the grade levels served or the nature of program operated by the charter		☐	58-66

school.			
❒ A. Conditions of Learning	☐		58-64
(Priority 1) Basic Needs	☐		58-59
(Priority 2) Implementation of State Standards	☐		59
(Priority 7) Course Access	☐		63-64
❒ B. Pupil Outcomes	☐		60-66
(Priority 4) Pupil Achievement (College and Career)	☐		60-62
(Priority 8) Other Pupil Outcomes	☐		64-66
❒ C. Engagement	☐		59-63
(Priority 3) Parental Involvement	☐		59-60
(Priority 5) Pupil Engagement	☐		62
(Priority 6) School Climate	☐		62-63
Provides specific annual actions to achieve these goals for each of the subgroups listed below:	☐		58-66
❒ Racial/Ethnic groups	☐		58-66
❒ Low-income students, including homeless students	☐		58-66
❒ English learners	☐		58-66
❒ Students with disabilities	☐		58-66
❒ Foster youth	☐		58-66
❒ **8. Transferability of High School Courses EC 47605 (b) (5) (A) (iii)**		☐	N/A
If serving high school students, describes how district/charter school informs parents of:	☐		N/A
❒ Transferability of courses to other public high schools; and	☐		N/A
❒ Eligibility of courses to meet college entrance requirements	☐		N/A
❒ 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)	☐		N/A
Strengths:			
Areas of Concern:			
Conclusions:			

ESB	B. Measurable Student Outcomes - "Exit Outcomes" or "Graduation Standards"	Evidence	Addressed in Petition	Page
❒	**Pupil outcomes are measurable, i.e. specific assessments listed for each exit outcome.**		☐	81-95
	How pupil outcomes will address state content and performance standards in core academics.	☐		81-95
	Exit outcomes include acquisition of academic and non-academic skills.	☐		81-95
	Concise (one page) list of exit outcomes encompass specific skills, not too vague.	☐		81
	Affirmation that "benchmark" skills and specific classroom-level skills will be developed.	☐		81-95
	Affirmation/description that exit outcomes will align to mission, curriculum and assessments.	☐		81-95
	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.	☐		N/A
	Lists school-wide student performance goals students will make over a given period of time, projected attendance, dropout, or graduation rate goals, etc.	☐		81-95
	Acknowledges that exit outcomes and performance goals may need to be modified over time.	☐		81-95
	If high school, graduation requirements defined.	☐		N/A
	If high school, WASC accreditation standards addressed.	☐		N/A
❒	**LCFF/LCAP Measurable Goals of the Education Program: Charter provides assurance that all identified subgroups will meet performance goals that are stated in the charter**		☐	81-95
❒	Statement that pupil achievement measurements will include the elements listed below:		☐	81-82
❒	Alignment with state priorities 52060 (d) and description of **how** the charter will address all 8 state priorities		☐	81-95
❒	(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.		☐	85-86
❒	(B) The Academic Performance Index, as described in Section 52052		☐	86
❒	(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		☐	N/A

	and frameworks,		
❒	(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.	☐	86
❒	(E) The English learner reclassification rate.	☐	87
❒	(F) The percentage of pupils who have passed an advanced placement examination with a score of 3 or higher.	☐	N/A
❒	(G) The percentage of pupils who participate in, and demonstrate college preparedness pursuant to, the Early Assessment Program.	☐	N/A

Strengths:

Areas of Concern:

Conclusions:

ESB	C. The Method by Which Pupil Progress in Meeting Outcomes Will be Measured	Evidence	Addressed in Petition	Page
	At least one assessment method or tool listed for each of the exit outcomes	☐		96-104
	Assessments include multiple, valid and reliable measures using traditional/ alternative tools	☐		96-104
	Chosen assessments are appropriate for standards and skills they seek to measures	☐		96-104
	Affirmation/description of how assessments align to mission, exit outcomes, and curriculum	☐		96-104
	Describes minimal required performance level necessary to attain each standard	☐		96-104
	Outlines a plan for collecting, analyzing and reporting student/school performance data	☐		99-104
❒	**LCFF/LCAP Assurance that methods of assessment are aligned with measureable student outcomes**		☐	100
❒	(A) Utilizes a variety of assessment tools that include multiple, valid and reliable measures using traditional/alternative tools appropriate to the skills, knowledge, or attitudes being assessed. Including, at a minimum tools that employ objective means of assessment.		☐	96-102
❒	(B) Include the annual assessment tools as required by state and federal assessments (CAASPP, CELDT, etc.)		☐	96-97, 100-102
❒	(C) Outlines a plan for collecting, analyzing, and reporting data continuously to monitor and improve the charter school's educational program.		☐	102-104

Strengths:

Areas of Concern:

Conclusions:

OIS	D. Governance Structure of School (Including Parental Involvement)	Evidence	Addressed in Petition	Page
❒	Describes what role parents have in the governance of the school		☐	109-110
❒	Describes key features of governing structure (usually a board of directors) such as:		☐	105-108
	• Size/composition of board	☐		105-106
	• Board committees or advisory councils	☐		108
	• Board's scope of authority/responsibility/conflict of interest	☐		106-108
❒	Status as a non-profit or public school		☐	105
❒	If non-profit, provisions for liability of debts		☐	105
	Has set of, proposed bylaws, policies or similar documents	☐		Appendix VIII-a to VIIIc
	Initial governing board members identified by name or the process used to select them	☐		Appendix I-c
	Clear description of school's legal status and determination of whether a board member from the charter-granting agency is on the board of the charter	☐		105-106
❒	Demonstrates compliance with Brown Act		☐	106
❒	Annual Review and Revision of the Local Control Accountability Plan (LCAP).		☐	104-110

Strengths:

Areas of Concern:

Conclusions:

HRB	E. Qualifications to be Met by Individuals to be Employed by The School	Evidence	Addressed in Petition	Page
	Identifies roles and functions of staff members (including…) • Job Descriptions for Positions • Identifies key staff positions with the charter school	☐		113-122
	Process for staff selection	☐		111-112
	Procedure for adequate background checks	☐		111
	Salaries and benefits for all employees	☐		112-113, 143, App. X-a
	Measures of assessment of performance	☐		112
	Describes specific key qualifications (knowledge, experience, education, certification, etc.) sufficient to ensure the health and safety of pupils and staff.	☐		113-122
❒	Defines "core, college preparatory" teachers/affirms they will hold appropriate credentials (Commission on Teacher Credentialing Certificate/Permit) • Identifies whether these teachers will teach only within the restrictions of their credentials		☐	120
	Verification that teachers and paraprofessionals who are required to be certified are "highly qualified" as required by the federal No Child Left Behind Act	☐		120
	Identifies any non-core, non-college prep teaching positions staffed by non-certified teachers and their qualifications	☐		N/A
	The credentials/qualifications of other charter school staff (e.g., counselors, librarians, administrators, nurses and others)	☐		113-122
	Statement of acknowledgment that all employees, even if not public, are subject to state and federal employment laws	☐		113-122
	Explains how teachers will learn the curricula	☐		56-58

Strengths:

Areas of Concern:

Conclusions

HRB	F. Health and Safety Procedures	Evidence	Addressed in Petition	Page
❒	Affirms that each employee will furnish the school with a criminal record summary		☐	123-125
	Outlines specific health and safety practices addressing such key areas as:	☐		123-125
	• Seismic safety (structural integrity and earthquake preparedness)	☐		123-125
	• Natural disasters and emergencies	☐		123-125
	• Immunizations, health screenings, administration of medications, employee TB testing	☐		123-125
	• Tolerance for use of drugs and/or tobacco	☐		123-125
	• Staff training on emergency and first aid response	☐		123-125
	• Description of the charter school's safety plan and disaster preparedness plan	☐		123-125
	References/accompanied by more detailed set of health and safety related policies/procedures	☐		123-125
❒	Method for conducting criminal background checks in potential employees, contractors, and volunteers as required by law to ensure that the charter does not hire any person who has been convicted of a violent serious felony		☐	123

Strengths:

Areas of Concern:

Conclusions

OIS	G. Means to Achieve a Reflective Racial and Ethnic Balance	Evidence	Addressed in Petition	Page
	Lists several specific practices/policies likely to lead to a diverse applicant pool/enrollment: practices and policies appear to be selected to target relevant racial and ethnic groups	☐		126-128
	• Describes the means by which the school will achieve, or has achieved, racial and ethnic balance which is reflected of the district/COE's general student population	☐		126-128

Strengths:

Areas of Concern:

Conclusions:

OIS	H. Admissions Requirements	Evidence	Addressed in Petition	Page
❒	Mandatory assurances regarding non-discriminatory admission procedures		☐	129
❒	No contradiction of admissions requirements *re: conversion schools and public random drawings* • Describes how random drawing will be conducted		☐	130-131
	Clearly describes admissions requirements, including any preferences • Identifies that the charter school will give preference to pupils who reside in the district and how the charter school will employ this preference	☐		130-131
	Includes a copy of an annual parent/student contract, if available	☐		N/A
	Proposed admissions and enrollment process and timeline	☐		129-131

Note that with regard to student recruitment, charter schools cannot recruit students in any way that discriminates against students on the basis of race, gender, gender identity, gender expression, color, national origin or disability. In advertising for students, charter schools are required by federal law to distribute materials in ways that effectively reach all segments of the parent community. Charter schools must also be sure to safeguard the rights of parents/guardians who are limited-English proficient, providing materials in languages other than English in order to communicate effectively with all parent groups. Similarly, in recruiting students of parents/guardians with disabilities, outreach materials should be available upon request in various alternative formats (such as Braille or large print, or in public meetings where interpreters are available).

Strengths:

Areas of Concern:

Conclusions

BSB	I. Financial Audit	Evidence	Addressed in Petition	Page
	Procedure to select and retain independent auditor	☐		132
	Qualifications of independent auditor	☐		132
	Audit will employ generally accepted accounting procedures	☐		132
	Describe specific scope of audit	☐		132
	Timing of audit and whom it will be sent to	☐		132
	Process for resolving audit exceptions to satisfaction of granting agencies	☐		132

Areas of Concern:

Conclusions

OIS	J. Pupil Suspension Expulsion	Evidence	Addressed in Petition	Page
	Student code of conduct and process by which this information is given to students and parents/guardians	☐		133
	Procedure for involving parents, students and staff in designing and implementing a discipline policy	☐		133-142
	Reference to a comprehensive set of student disciplinary policies OR detailed process by which student may be suspended or expelled	☐		133-142
	Describes disciplinary steps to be taken prior to suspension or expulsion	☐		133
	Evaluation Criteria [5CCR § 11967.5.1(f)(10)] (A) Identify a preliminary list, subject to later revision pursuant to subparagraph (E), of the offenses for which students in the charter school must (where non-discretionary) and may (where discretionary) be suspended and, separately, the offenses for which students in the charter school must (where non-discretionary) or may (where discretionary) be expelled, providing evidence that the petitioners' reviewed the offenses for which students must or may be suspended or expelled in non-charter public schools.	☐		134-136
	(B) Identify the procedures by which pupils can be suspended or expelled.	☐		136-142
	(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.	☐		136-142
	(D) Provide evidence that in preparing the lists of offenses specified in subparagraph (A) and the procedures specified in subparagraphs (B) and (C), the petitioners reviewed the lists of offenses and procedures that apply to students attending non-charter schools, and provide evidence that the charter petitioners believe their proposed lists of offenses and procedures provide adequate safety for students, staff, and visitors to the school and serve the best interests the school's pupils and their parents (guardians).	☐		133
	(E) If not otherwise covered under subparagraphs (A), (B), (C), and (D): 1. Provide for due process for all pupils and demonstrate an understanding of the rights of pupils with disabilities in regard to suspension and expulsion. 2. Outline how detailed policies and procedures regarding suspension and expulsion will be developed and periodically reviewed, including, but not limited to, periodic review and (as necessary) modification of the lists of offenses for which students are subject to suspension or expulsion.	☐		133-142
	What educational alternative, if any, will be provided to students who were suspended or expelled	☐		140
	Describes who or what body will be responsible for final suspension/expulsion decisions	☐		137
	Describes appeal procedures	☐		140
	Identifies process by which the charter school will notify the superintendent of the school district of the expelled student's last known address within 30 days and send a copy of student's cumulative record, including transcripts of grades and health records to the school district	☐		139
	Outlines or describes strong understanding of relevant laws protecting constitution rights of students, generally, and of disabled and other protected classes of students	☐		133, 140-142
	Policies balance students' rights to due process with responsibility to maintain a safe learning environment	☐		133-142
	Explains how resident school district or COE will be involved in disciplinary matters	☐		137-142
Strengths:				
Areas of Concern:				
Conclusions				

HRB	K. Staff Retirement System	Evidence	Addressed in Petition	Page
❒	Statement of whether staff will participate in STRS, PERS, or Social Security (if STRS, then all teachers must do so)		☐	143
	Relationship between teachers and district/county bargaining unit	☐		145
	Process by which salaries, benefits, working conditions and items, i.e., calendars, holidays, vacations, work day and year will be determined	☐		112-113, 143
	Labor procedures which will be applied to employees	☐		112-113, 145, 147
	Process for resolving complaints/grievances	☐		146
	Process for ensuring due process	☐		146
	Manner by which staff members will be covered by STRS, PERS, Social Security or Medicare	☐		143
	Process for staff recruitment, selection, evaluation and **termination**	☐		111-122
	Procedure for processing and monitoring credentials if required	☐		111

Strengths:

Areas of Concern:

Conclusions

OIS	L. Attendance Alternatives	Evidence	Addressed in Petition	Page
❒	States that students may attend other district schools or pursue an inter-district transfer in accordance with existing enrollment and transfer policies of their district or county of residence or description of other attendance alternatives		☐	144

Strengths:

Areas of Concern:

Conclusions:

HRB	M. Description of Employee Rights	Evidence	Addressed in Petition	Page
❒	Description of employee rights upon leaving school district		☐	145
	Acknowledgment whether collective bargaining contract in sponsor district will be controlling	☐		145
	Whether and how charter school staff may resume employment within the district	☐		145
	Sick/vacation leave (ability to carry it over to and from charter school)	☐		145
	Whether charter school staff will continue to earn service credit (tenure) in district while at charter school	☐		145
	How employees will be paid (e.g. salaried, hourly, etc.)	☐		112-113
	Describes employee benefits	☐		112-113, 143
	Identifies intended employment status of charter school employees	☐		145
	Identifies whether the charter school will be responsible for the payment of social security and applicable taxes for charter school employees	☐		143
	Describes how rights will be communicated to prospective employees	☐		145

Strengths:

Areas of Concern:

Conclusions:

OIS	N. Dispute Resolution Process	Evidence	Addressed in Petition	Page
	Outlines a simple process for charter and granting agency to settle disputes	☐		146
	Process indicates whether it is binding on school or granting agency/fair process	☐		146
	Step by step process for identifying/framing dispute points	☐		146
	• Whether internal charter disputes may be brought to granting agency	☐		146
	• Identifies specific parties to be involved at each step	☐		146
	• Basic rules at each step	☐		146
	• Which results are binding	☐		146
Strengths:				
Areas of Concern:				
Conclusions:				

HRB	O. Labor Relations	Evidence	Addressed in Petition	Page
❒	Whether charter or local school district will be employer for EERA purposes		☐	147
	If local district the employer, includes provisions clarifying charter's roles in collective bargaining	☐		N/A
	A declaration of whether charter school employees will be part of the collective bargaining unit in the sponsoring district	☐		N/A
	Statement that charter school employees who are part of the sponsoring district's or county's employee union will be employed under the terms of the district or country collective bargaining agreement	☐		N/A
	If the petitioners elect not to have charter school employees join the sponsoring district's or county's employee union, a declaration as to whether petitioners intend to organize and bargain as a separate unit. Note the charter employees are not required to engage in collective bargaining, but they have that right if they choose as a group to do so.	☐		147
Strengths:				
Areas of Concern:				
Conclusions				

OIS /BSB	P. Closure of Charter School	Evidence	Addressed in Petition	Page
	Outlines an adequate process to be used if the charter school closes	☐		148-149
	Process includes a final audit of the charter school that includes specific plans for disposition of all assets and liabilities of the charter school and for the maintenance and transfer of public records, including pupil records (per code)	☐		148
	What the employment status relative to the district/county of charter school employees is and what it will be in the event the charter school ceases or in the event employees seek employment in the district/county	☐	?	145
Strengths:				
Areas of Concern:				
Conclusions:				

REQUIRED SUPPLEMENTAL INFORMATION: Education Code § 47605(g)				
BSB	**Administrative Services**	**Evidence**	**Addressed in Petition**	**Page**
❒	Outlines an adequate process to be used if the charter school closes		☐	148-149
	Process includes a final audit of the charter school that includes specific plans for disposition of any net assets and for the maintenance and transfer of pupil records	☐		148-149
Areas of Concern:				
Conclusions				

BSB	Civil Liability	Evidence	Addressed in Petition	Page
❒	Did the petitioners provide information regarding the potential civil liability effects, if any, upon the school, and the school district where the charter school operates or proposes to operate and upon the county board of education?		☐	152-153
Areas of Concern:				
Conclusions				

BSB	Financial Plan	Evidence	Addressed in Petition	Page
❒	First year operational budget		☐	150-151, Appendix Xa Xb
	• Cash flow for first three years	☐		150-151, Appendix Xa Xc
	• Financial projections for first three years	☐		150-151, Appendix Xa Xb
Areas of Concern:				
Conclusions				

BSB	Planning Assumptions	Evidence	Addressed in Petition	Page
	• Number/types of students	☐		Appendix X-a
	• Number of staff	☐		Appendix X-e
	• Facilities needs	☐		Appendix X-f
	• Costs of all major items are identified and within reasonable market ranges	☐		Appendix X-a
	• Revenue assumptions in line with state and federal funding guidelines	☐		Appendix X-a
	• Revenue from "soft sources" (e.g., donations, grants and fundraisers) less than 10% of ongoing operational costs	☐		Appendix X-a
	• Timeline allows window for grant applications to be submitted and funded	☐		Appendix X-a
Areas of Concern:				
Conclusions				

BSB	Start-Up Costs	Evidence	Addressed in Petition	Page
	• Clearly identifies most major start-up costs	☐		Appendix X-a, X-b
	• Staffing	☐		Appendix X-a, X-b
	• Facilities	☐		Appendix X-a, X-b
	• Equipment and Supplies	☐		Appendix X-a, X-b
	• Professional Services	☐		Appendix X-a, X-b
	• Assumptions in line with overall school design plan	☐		Appendix X-a, X-b
	• Identifies potential funding source	☐		Appendix X-a, X-b

• Timeline allows for grant and fundraising	☐		Appendix X-a, X-b
Areas of Concern:			
Conclusions			

BSB	Annual Operating Budget	Evidence	Addressed in Petition	Page
	• Annual revenues and expenditures clearly identified by source	☐		Appendix X-a, X-b
	• Revenue assumptions closely related to applicable state and federal funding formulas	☐		Appendix X-a, X-b
	• Expenditure assumptions reflect school design plan	☐		Appendix X-a, X-b
	• Expenditure assumptions reflect market costs	☐		Appendix X-a, X-b
	• "Soft" revenues not critical to solvency	☐		Appendix X-a, X-b
	• Strong reserve or projected ending balance (the larger of 2–3% of expenditure or $25,000)	☐		Appendix X-a, X-b
	• If first year is not in balance, identifies solvency in future years and sources of capital sufficient to cover deficits until year budget is projected to balance.	☐		Appendix X-a, X-b
	• Expenditure for sufficient insurance to name district as also insured/hold harmless agreement	☐		Appendix X-a, X-b
	• Expenditure sufficient for reasonably expected legal services	☐		Appendix X-a, X-b
	• Expenditure for Special Education excess costs consistent with current experience in county	☐		Appendix X-a, X-b
Areas of Concern:				
Conclusions				

BSB	Cash Flow Analysis	Evidence	Addressed in Petition	Page
	• Monthly projection of revenue receipts in line with state/federal funding disbursements	☐		Appendix X-c
	• Expenditures projected by month and correspond with typical/reasonable schedules	☐		Appendix X-c
	• Show positive fund balance each month and/or identify sources of working capital	☐		Appendix X-c
Areas of Concern:				
Conclusions				

BSB	Long-term Plan	Evidence	Addressed in Petition	Page
	• Projects revenues and expenditures for at least two additional years	☐		Appendix X-b, X-c
	• Revenue assumptions based on reasonable potential growth in state and federal revenues	☐		Appendix X-b, X-c
	• Revenue assumptions based on reasonable student growth projections	☐		Appendix X-b, X-c
	• Reasonable cost-of-living and inflation assumptions	☐		Appendix X-b, X-c
	• Annual fund balances are positive or likely sources of working capital are identified	☐		Appendix X-b, X-c
Areas of Concern:				
Conclusions				

BSB	District Impact Statement	Evidence	Addressed in Petition	Page
	Does the charter include an impact statement?	☐		152-153
	Provides estimated numbers of students anticipated to enroll	☐		151
	Identify whether or not will request district-owned facilities	☐		152
Areas of Concern:				
Conclusions				

SSB	Special Education/SELPA	Evidence	Addressed in Petition	Page
❒	Identifies whether or not in an independent LEA for special education purposes		☐	73-80
❒	Consulted with the Santa Clara County SELPA Director		☐	73-80
	• Discussed special education responsibilities of charter	☐		73-80
	• Discussed application of SELPA policies	☐		73-80
❒	In writing explains how special education services will be provided consistent with SELPA plan and/or policies and procedures		☐	73-80
	• Includes fiscal allocation plan	☐		78
❒	If charter not an independent LEA:		☐	73-80
	• Clarifies in charter the responsibilities of each party for service delivery	☐		73-80
	❒ Referral	☐		73-80
	❒ Assessment	☐		73-80
	❒ Instruction	☐		73-80
	❒ Due Process	☐		73-80
	❒ Agreements describing allocation of actual and excess costs	☐		73-80
	❒ Charter fiscally responsible for fair share of any encroachment on general funds	☐		73-80
❒	If charter is LEA within County SELPA		☐	73-80
	• Notifies SELPA Director of intent prior to February 1st of the preceding school year	☐		N/A
	• Located within SELPA geographical boundaries	☐		N/A
	• Provides current operating budget in accordance with Ed Code **§** 42130 and **§** 42131	☐		N/A
	• Provides assurances that all be instructed in safe environment	☐		N/A
	• Provides copy of original charter petition and any amendments	☐		N/A
	• Responsible for any legal fees relating to application and assurances process	☐		N/A
	• Meets the terms of the "Agreement Regarding the Organization, Implementation, Administration and Operation of the SELPA (Section 12–13, Appendix A)	☐		N/A
	• Meets the terms of all SELPA policies and procedures	☐		N/A
	• Charter fiscally responsible for fair share of any encroachment on general funds	☐		N/A
❒	Petition includes the following assurances:		☐	73-80
	• The charter will comply with all provisions of IDEA	☐		73-80
	• No student will be denied admission based on disability or lack of available services	☐		73-80
	• The charter will include a description of the school's SST process as it relates to identification of students who may qualify for Special Education	☐		73-80
	• Any student potentially in need of Section 504 services responsibility of charter school	☐		73-80
❒	Staff members providing special education services are appropriately credentialed		☐	73-80
❒	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		☐	73-80
❒	The charter school will assume full responsibility for appropriate accommodation to address the needs of any student		☐	73-80
❒	The responsibility of the school to provide special education, instruction and related serves to the students enrolled in the school regardless of students' district of residence		☐	73-80
❒	Specialized instruction and services available at the school		☐	73-80
❒	The provision of Designated Instruction and Services (DIS)		☐	73-80
❒	Special transportation for students whose IEPs indicate that service is necessary for the provision of FAPE		☐	73-80
❒	The procedures for ensuring that students are referred, assessed and served in a timeline manner		☐	73-80
❒	A description of the school's "Search and Service" procedures		☐	73-80
❒	The dispute resolution procedures that will apply to any disputes between educational entities, including the SELPA and LEA, regarding the provision of special education services in the charter school.		☐	73-80
❒	Petition describes process for notifying district of residence and chartering district when a special education student enrolls, becomes eligible, ineligible and/or leaves charter school		☐	73-80
	Overview of how special education funding and services will be provided by:	☐		73-80
	• Charter School	☐		73-80
	• Charter Granting Agency	☐		73-80

	• SELPA	☐		73-80
☐	Petition describes the transition to or from a district when a student with an IEP enrolls in, or transfers out of, the charter school		☐	73-80

Strengths:

Areas of Concern:

Conclusions

OIS	Grade Level, Geographic and Site Limitations	Evidence	Addressed in Petition	Page
	Does the Petition demonstrate that it will operate a single charter school within the geographic jurisdiction of the school district	☐		151-152
	• If not, does the Petition demonstrate any basis for an exception	☐		N/A
	Does the Petition identify where the school will operate	☐		151-152
	Does the Petition demonstrate that it will not serve grade levels not served by this district unless it serves all of the grade levels	☐		18

Strengths:

Areas of Concern:

Conclusions: