



**CONTRA COSTA COUNTY OFFICE OF EDUCATION
CHARTER SCHOOL APPEAL PETITION REVIEW CHECKLIST**

Initial
 Renewal

Proposed Charter School	Petitioner Contact		Denial Information	Petition Review and Presentation Timelines (Hearing- 30 days from receipt; decision 60 days)	
Name of Proposed Charter School: Location(s) of Proposed Charter School:	Name:		District Denying:	Date Petition Filed with CCOE:	Decision by Board (60 days from date of receipt, unless 30 day extension) Due Date: 30 day extension? Date of Board Decision:
	Phone:			Date Petition certified as complete:	
	Address:		Date of Board Action:	Public Hearing Due Date:	
	Email:			Date Held:	
Area of Review	Matrix Page	Department(s) Responsible		Name of Reviewer	Petition Pg
Required Petition Signatures	3	Business & Administrative Services			
Required Affirmations	3	Business & Administrative Services			
A. Education Program	3	Educational Services			
B. Measureable Student Outcomes	4	Educational Services			
C. Student Progress Measurement	5	Educational Services			
D. Governance Structure	5	Business & Administrative Services			
E. Employee Qualifications	6	Human Resources			
F. Health and Safety Procedures	6	Human Resources			
G. Racial and Ethnic Balance	6	Business & Administrative Services			
H. Admission Requirements	7	Business & Administrative Services			
I. Annual Financial Audits	7	Business & Administrative Services			
J. Suspension and Expulsion	7	Education Services			
K. Staff Retirement System	8	Human Resources			
L. Public School Alternatives	8	Business & Administrative Services			
M. Employee Rights	8	Business & Administrative Services			
N. Dispute Resolution Process	8	Business & Administrative Services			
O. Labor Relations	8	Human Resources			
P. School Closure	8	Business & Administrative Services			
ADDITIONAL INFORMATION REQUIRED					
I. Facilities	9	Business & Administrative Services			
II. Assessments/Parent Involvement	9	Business & Administrative Services			
III. Effective Date	9	Business & Administrative Services			
IV. Annual Financial Report	9	Business & Administrative Services			

Area of Review	Matrix Page	Department(s) Responsible	Name of Reviewer	Petition Pg
V. Financial Plan	10-11	Business & Administrative Services		
VI. Impact Statement	11	Business & Administrative Services		
VII. Special Education	12	Educational Services/ Student Programs		
VIII. Annual Performance Audits	13	Business & Administrative Services		
IX. Successful Implementation	13	Business & Administrative Services		

- ◆ *Strongly suggested to ensure that charter elements and other required information is reasonably comprehensive.*
- *Required to be included in charter petition and/or Memorandum of Understanding.*

INITIAL FINDING BY THE COUNTY BOARD OF EDUCATION (Education Code 47605.6 (a)(1))				
To be approved under this section, the County Board of Education must determine that this countywide charter, in addition to other requirements of law, will offer services to a pupil population that will benefit from those services and that cannot be served as well by a charter that operates in only one school district in the county	Yes	No	N/A	
REQUIRED PETITION SIGNATURES (Education Code 47605.6(a)(1)(A) & (B))				
• Parents/guardians, residing in Contra Costa County, equal to at least 50% of the number of age appropriate students expected to enroll for 1st year of operation, in the form required by law	Yes	No	N/A	
• 50% of the number of appropriately credentialed teachers expected to be employed during 1st year of operation, in the form required by law	Yes	No	N/A	
• Names, addresses, phone numbers of persons endorsing proposal (Section 47605)				
Before either petition form will be reviewed, each of the school districts in which the charter school applicant proposes to operate a facility will have received at least 30 days notice of such intent.				
REQUIRED AFFIRMATIONS (Education Code 47605.6(e)(1))				
Statement that school will be non-sectarian in its programs, admission policies, employment practices, and all other operations, will not charge tuition, and will not discriminate against any pupil on the basis of ethnicity, national origin, gender or disability	Yes	No	N/A	
List of consultants used or will be used for purpose of developing, operating, evaluating charter, etc.				
REQUIRED ELEMENTS (Education Code 47605.6(b)(5)(A)–(M))/ADDITIONAL REQUIRED INFORMATION				
A. Educational Program	Strong	Sufficient	Insufficient	N/A
□ 1. Targeted School Populations				
◆ Age, grade levels and number of students				
□ Describe students whom the charter will attempt to educate				
□ 2. Attendance				
◆ School year, academic calendar, number of school day and instructional minutes				
◆ Attendance expectations and requirements				
□ 3. What it Means to be an Educated Person in The 21st Century				
□ 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				

<input type="checkbox"/> 4. Description of How Learning Best Occurs	Strong	Sufficient	Insufficient	N/A
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 student performance 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 students				
◆ Describes instructional strategies for English Learners				
◆ Describes instructional strategies & intervention for low-performing students				
◆ Describes instructional strategies for high- performing students				
<input type="checkbox"/> 5. Additional Requirements for Charter Schools Serving High School Student	Strong	Sufficient	Insufficient	N/A
<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				
Comments:				
B. Measurable Student Outcomes - “Exit Outcomes” or “Graduation Standards” (Education Code 47605(b)(5)(B))	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> Pupil outcomes are measurable, i.e. specific assessments listed for each exit outcome				
◆ How pupil outcomes will address state content and performance standards in core academics				
◆ Clearly stated exit outcomes include acquisition of academic and non-academic skills				
◆ 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				
◆ Lists school-wide student performance goals students will achieve over a given period of time: Projected attendance levels, dropout percentage, graduation rate goals, etc.				
◆ Acknowledges that exit outcomes and performance goals may need to be modified over time				
◆ If high school, graduation requirements defined and WASC accreditation addressed				

Comments:

C. The Method by Which Pupil Progress in Meeting the Pupil Outcomes Will be Measured (Education Code 47605(b)(5)(C))	Strong	Sufficient	Insufficient	N/A
◆ At least one assessment method or tool listed for each of the exit outcomes				
◆ 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 AYP)				
◆ 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				

Comments:

D. Governance Structure of School Including, But Not Limited to, Parental Involvement (Education Code 47605(b)(5)(D))	Strong	Sufficient	Insufficient	N/A
<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:				
• Compliance with Brown Act, Public Records Act and Conflict of Interest Policy				
• Size/composition of board, board committees and/or advisory councils				
• Board's scope of authority/responsibility				
• Method for selecting initial board members				
• Board election/appointment and replacement				
◆ 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 CCCOE				

Comments:

E. Qualifications to be Met by Individuals to be Employed by The School (Education Code 47605(b)(5)(E))	Strong	Sufficient	Insufficient	N/A
◆ Identifies all key staff positions with the school				
◆ Describes specific key qualifications (knowledge, experience, education, certification, etc.)				
☐ Defines core, college preparatory teachers & affirms they will hold appropriate Commission on Teacher Credentialing certificate, permit or other equivalent document				
Identifies any non-core, non-college prep teaching positions staffed by non-certified teachers, along with required qualifications				
Comments:				
F. Health and Safety Procedures (Education Code 47605(b)(5)(F))	Strong	Sufficient	Insufficient	N/A
☐ Affirms that each employee will furnish the school with a criminal record summary				
◆ Outlines specific health and safety practices addressing such key areas as:				
◆ • Seismic safety (structural integrity and earthquake preparedness)				
◆ • Natural disasters and emergencies				
◆ • Immunizations, health screenings, administration of medications				
◆ • Tolerance for use of drugs and/or tobacco				
◆ • Staff training on emergency and first aid response				
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 CCCOE				
Comments:				
G. Means to Achieve a Racial and Ethnic Balance (Education Code 47605(b)(5)(G))	Strong	Sufficient	Insufficient	N/A
☐ Lists specific practices/policies designed to attract a diverse applicant pool/enrollment				
◆ Practices and policies appear likely to achieve targeted racial and ethnic balance				
Comments:				

H. Admission Requirements (Education Code 476059(b)(5)(H))	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> Mandatory assurances regarding non-discriminatory admission procedures				
<input type="checkbox"/> Admission preferences which are required for conversion charter schools				
◆ Clearly describes admissions requirements, including any admission preferences				
◆ Proposed admissions and enrollment process and timeline, as well as procedures for public random drawings, if necessary.				
I. Financial Audit (Education Code 47605(b)(5)(I))	Strong	Sufficient	Insufficient	N/A
◆ Procedure to select and retain independent auditor				
◆ Qualifications of independent auditor				
<input type="checkbox"/> Audit will employ generally accepted accounting procedures				
<input type="checkbox"/> The manner in which the audit will be conducted				
◆ Scope and timing of audit, as well as required distribution of completed audit				
<input type="checkbox"/> Process for resolving audit exceptions and deficiencies to the satisfaction of the Contra Costa County Office of Education				
Comments:				
J. Pupil Suspension and Expulsion (Education Code 47605(b)(5)(J))	Strong	Sufficient	Insufficient	N/A
<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				
<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, in particular				
◆ Policies balance students' rights to due process with responsibility to maintain a safe learning environment				
◆ Explains how CCCOE may be involved in disciplinary matters				
Comments:				
K. Staff Retirement System (Education Code 47605(b)(5)(K))	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> Describes manner by which staff members will be covered by STRS, PERS and/or federal social security; and or how the charter will create a system to address employees' retirement funding				

<input type="checkbox"/> Specifies specific positions to be covered by each system and staff designated to ensure that arrangements for coverage are made.				
Comments:				
L. Public School Attendance Alternatives (Education Code 47605(b)(5)(L))	Strong	Sufficient	Insufficient	N/A
The public school attendance alternatives for pupils residing within the school district who choose not to attend charter schools.				
M. Employment Rights of Employee of School District (Education Code 47605(b)(5)(M))				
<input type="checkbox"/> 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.				
N. Dispute Resolution Process	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> Outlines a simple process for the charter school and the Contra Costa County Office of Education to settle disputes relating to the provisions of the charter				
◆ Outlines process how charter school will resolve internal complaints and disputes				
Comments:				
O. Labor Relations (Education Code 47605(b)(5)(O))	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> States whether the charter school or CCCOE will be the employer for EERA purposes				
◆ If Contra Costa County Office of Education is to be the employer, includes provisions clarifying charter's role in collective bargaining process				
P. Closure of Charter Schools (Education Code 47605(b)(5)(P))	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> A description of the procedures to be used if the charter school closes.				
<input type="checkbox"/> 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.				

- ◆ *Strongly suggested to ensure that charter elements and other required information is reasonably comprehensive.*
- Required to be included in charter petition and/or Memorandum of Understanding.*

ADDITIONAL REQUIREMENTS (Education Code 47605 (c))					
I. Location of Facility (Education Code 47605(g))		Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/>	Includes the location of each charter school facility which the petitioner proposes to operate				
<input type="checkbox"/>	Describes each charter school facility which the petitioner proposes to operate in terms of safety and educational suitability				
<input type="checkbox"/>	Describes the current and projected availability of each charter school site				
II. Assessments / Parent Involvement (Education Code 47605 (c)(1-2))					
<input type="checkbox"/>	School 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.				
<input type="checkbox"/>	School shall, on a regular basis, consult with their parents, legal guardians, and teachers regarding the school's educational programs.				
Comments:					
III. EFFECTIVE DATE		Yes	No	N/A	
<input type="checkbox"/>	Does the Petition demonstrate that the charter school will commence operation by September 30 of its first year of operation?				
IV. ANNUAL FINANCIAL REPORT					
<input type="checkbox"/>	Does the Petition demonstrate that the charter school shall provide the appropriate agencies with a copy of an annual financial report in a format prescribed by the State Superintendent of Public Education?				
Comments:					

REQUIRED SUPPLEMENTAL INFORMATION (Education Code 47605.6)

V. Financial Plan (Education Code 47605(g))	Strong	Sufficient	Insufficient	N/A
<input type="checkbox"/> First year operational budget				
• Start-up costs				
• Cash flow for first three years				
• Financial projections for first three years				
<input checked="" type="checkbox"/> Planning Assumptions	Strong	Sufficient	Insufficient	N/A
• Number/types of students				
• Number of staff				
• Facilities needs				
• Costs of all major items are identified and within reasonable market ranges				
• Revenue assumptions in line with state and federal funding guidelines				
• Revenue from “soft” sources less than 10% of ongoing operational costs				
• Timeline allows window for referenced grant applications to be submitted and funded				
<input checked="" type="checkbox"/> Start-Up Costs	Strong	Sufficient	Insufficient	N/A
• Clearly identifies all major start-up costs				
<input type="checkbox"/> Staffing				
<input type="checkbox"/> Facilities				
<input type="checkbox"/> Equipment and Supplies				
<input type="checkbox"/> Professional Services				
• Assumptions in line with overall school design plan				
• Identifies potential funding source				
• Timeline allows for grant and fundraising				
<input type="checkbox"/> Annual Operating Budget	Strong	Sufficient	Insufficient	N/A
• Annual revenues and expenditures clearly identified by source				
• Revenue assumptions closely related to applicable state and federal funding formulas				
• Expenditure assumptions reflect school design plan				
• Expenditure assumptions reflect market costs				
• “Soft” revenues not critical to solvency				
• Strong reserve or projected ending balance (the larger of 3% of expenditure or \$25,000)				
• 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				
• Expenditure for sufficient insurance to name district as also insured/hold harmless agreement				

• Expenditure sufficient for reasonably expected legal services				
• Expenditure for Special Education excess costs consistent with current experience in the county				
◆ Cash Flow Analysis	Strong	Sufficient	Insufficient	N/A
• Monthly projection of revenue receipts in line with local/state/federal funding disbursements				
• Expenditures projected by month and correspond with typical/reasonable schedules				
• Show positive fund balance each month and/or identify sources of working capital				
◆ Long-term Plan	Strong	Sufficient	Insufficient	N/A
• Projects revenues and expenditures for at least two additional years				
• Revenue assumptions based on reasonable potential growth in local, state and federal revenues				
• Revenue assumptions based on reasonable student growth projections				
• Reasonable cost-of-living and inflation assumptions				
• Annual fund balances are positive or sources of supplemental working capital are identified				
Comments:				
VI. Impact Statement	Strong	Sufficient	Insufficient	N/A
◆ Provides estimated numbers of students anticipated to enroll				
◆ Identifies whether charter will request to purchase support services from CCCOE				
◆ Describes suggested processes and policies between charter and CCCOE				
◆ Proposed support service needs and suggested payments to CCCOE or district for services				
• Clearly drafted contract/agreement or reference to MOU				
◆ Proposed legal status of school is identified				
☐ Addresses potential civil liability effects, if any, upon the school, any school district where the charter school may operate and upon the County Board of Education				
Comments:				

VII. Special Education	Yes	No	N/A
<input type="checkbox"/> Describes how special education services will be provided consistent with the appropriate SELPA Plan and/or policies and procedures			
<ul style="list-style-type: none"> • Includes fiscal allocation plan 			
<ul style="list-style-type: none"> • Clarifies in charter or an MOU the responsibilities of each party for service delivery 			
<ul style="list-style-type: none"> <input type="checkbox"/> Referral 			
<ul style="list-style-type: none"> <input type="checkbox"/> Assessment 			
<ul style="list-style-type: none"> <input type="checkbox"/> Instruction 			
<ul style="list-style-type: none"> <input type="checkbox"/> Due Process 			
<ul style="list-style-type: none"> <input type="checkbox"/> Agreements describing allocation of actual and excess costs 			
<ul style="list-style-type: none"> <input type="checkbox"/> Charter fiscally responsible for fair share of any excess costs 			
<input type="checkbox"/> If charter is LEA within SELPA			
<ul style="list-style-type: none"> • Notifies SELPA Director of intent prior to February 1st of the preceding school year 			
<ul style="list-style-type: none"> • Provides current operating budget in accordance with Ed Code 42130 and 42131 			
<ul style="list-style-type: none"> • Provides assurances that all be instructed in safe environment 			
<ul style="list-style-type: none"> • Provides copy of original charter petition and any amendments 			
<ul style="list-style-type: none"> • Responsible for any legal fees relating to application and assurances process 			
<ul style="list-style-type: none"> • Meets the terms of all the appropriate SELPA policies and procedures 			
<ul style="list-style-type: none"> • Charter fiscally responsible for fair share of any encroachment on general funds 			
<input type="checkbox"/> Petition includes the following assurances:			
<ul style="list-style-type: none"> • The charter will comply with all provisions of IDEA 			
<ul style="list-style-type: none"> • No student will be denied admission based on disability or lack of available services 			
<ul style="list-style-type: none"> • Will implement a Student Study Team process 			
<ul style="list-style-type: none"> • 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 the Contra Costa County Office of Education when a special education student enrolls, becomes eligible, ineligible and/or leaves charter school			
<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			
Comments			

VIII. Annual Performance Audits					
<input type="checkbox"/>	Petition/MOU describes what will occur during performance audits, including:	Strong	Sufficient	Insufficient	N/A
	• Review of each component of Initial/Renewal Charter Petition for compliance				
	• Analysis of whether goals are being met; review of all state and federal student assessment data and reports				
	• Summary of major decisions made/policies established by the board in each year				
	• Data on level of parent involvement in governance and operation of the school				
	• Summary data from annual student/parent satisfaction survey				
	• Data regarding number of staff, their qualifications and verification of credentials				
	• Copy of health/safety procedures and summary of any major changes				
	• Determination of the suitability of the facility in terms of health and safety				
	• Determination of the suitability of the facility in terms of educational utility				
	• Review copies of all required documentation (e.g. budget reports, financial projections, leases, insurance, etc.)				
	• Overview of admission practices				
	<input type="checkbox"/> Number of students actually enrolled				
	<input type="checkbox"/> Waiting lists				
	<input type="checkbox"/> Expulsions and suspensions				
	• Review of any internal/external dispute resolutions				
<input type="checkbox"/>	Site visit by CCCOE, or designee, including observation of the instructional program				
IX. Successful Implementation					
<input checked="" type="checkbox"/>	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				
<input checked="" type="checkbox"/>	The Petition includes a list of consultants whom the charter has engaged or proposes to engage, for the purpose of developing, operating and evaluating the charter school, together with a thorough description of the qualifications of such consultants.				
<input checked="" type="checkbox"/>	Does the information provided in the proposal confirm that the school will have the services of individuals who have the necessary background in curriculum, instruction, assessment, finance, facilities business management, organization, governance and administration?				