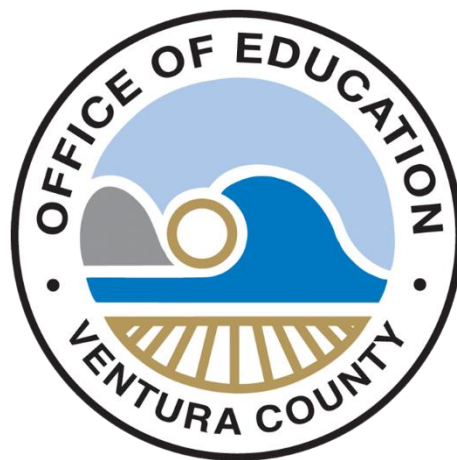


EXHIBIT 1 - Administrative Regulation 0420.4

**SUMMARY of REQUIRED COMPONENTS
of a SCHOOL CHARTER**

Revised 04/22/19

Ventura County Office of Education
5189 Verdugo Way
Camarillo, CA 93012



Ventura County Office of Education
Student Services Department
5189 Verdugo Way
Camarillo, CA 93012
(805) 383-1920 Phone
(805) 383-1908 Fax

EXHIBIT 1 - Administrative Regulation 0420.4

Revised 04/22/2019

SUMMARY OF REQUIRED COMPONENTS OF A SCHOOL CHARTER

The County Board of Education may grant a charter for the operation of a school only if the Board is satisfied that granting the charter is consistent with sound educational practice and that the charter school has reasonable justification for why it could not be established by petition to a school district pursuant to Education Code 47605. The Board may grant a charter if it is satisfied that the charter is consistent with sound educational practice and meets all of the following requirements:

- I. The charter school presents a sound educational program for the pupils to be enrolled in the charter school.
- II. The petitioners are demonstrably likely to successfully implement the program set forth in the petition.
- III. The petition contains the number of signatures required.
- IV. The petition contains an affirmation that the charter school shall be nonsectarian in its programs, admission policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate against any pupil on the basis of ethnicity, national origin, gender, gender identity, gender expression, or disability, in addition to the other requirements imposed by Education Code 47605.6(e).
- V. The petition contains reasonably comprehensive descriptions of all of the elements in Education Code 47605.6(b)(5) listed below as items 1 through 16.
 1. A description of the educational program of the charter school, designed, among other things, to identify those whom the charter school is attempting to educate, what it means to be an "educated person" in the 21st century, and how learning best occurs. The goals identified in the educational program must include the objective of enabling pupils to become self-motivated, competent, and lifelong learners. The petition shall include the annual goals of the charter school for all pupils and for each subgroup of pupils identified pursuant to Section 52052, to be achieved in the state priorities, as described in Section 52060(d), that apply for the grade levels served, or the nature of the program operated, by the charter school, and specific annual actions to achieve those goals. If the proposed charter school will enroll high school pupils, the petition shall include the requirements prescribed in Section 47605.6(b)(5)(A).

2. The measurable pupil outcomes identified for use by the charter school. "Pupil outcomes" means the extent to which all pupils of the charter school demonstrate that they have attained the skills, knowledge, and aptitudes specified as goals in the charter school's educational program. Pupil outcomes shall include outcomes that address increases in pupil academic achievement both schoolwide and for all groups of pupils served by the charter school, as defined in Section 47607(a)(3)(B). The pupil outcomes shall align with the state priorities, as described in Section 52060(d).
3. The method(s) by which pupil progress in meeting those pupil outcomes is to be measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card.
4. The location of each charter school facility that the petitioner proposes to operate.
5. The governance structure of the charter school, including, but not limited to, the process to be followed by the charter school to ensure parental involvement.
6. The qualifications to be met by individuals to be employed by the charter school.
7. The procedures that the charter school will follow to ensure the health and safety of pupils and staff. These procedures shall include the requirement that each employee of the charter school furnish the charter school with a criminal record summary as described in Education Code 44237.
8. The means by which the charter school will achieve a racial and ethnic balance among its pupils that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted.
9. The manner in which annual, independent, financial audits shall be conducted, which shall be in accordance with regulations established by the State Board of Education and employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority.
10. The procedures by which pupils can be suspended or expelled from the charter school for disciplinary reasons or otherwise involuntarily removed from the charter school for any reason. These procedures, at a minimum, shall include an explanation of how the charter school will comply with federal and state constitutional procedural and substantive due process requirements that is consistent with Section 47605.6(b)(5)(J).

11. The manner by which staff members of the charter school will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security.
12. The procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter.
13. Admission policy and procedures, consistent with Section 47605.6(e).
14. The public-school attendance alternatives for pupils residing within the county who choose not to attend the charter school.
15. The rights of an employee of the county office of education, upon leaving the employment of the county office of education, to be employed by the charter school, and any rights of return to the county office of education that an employee may have upon leaving the employ of the charter school.
16. The procedures to be used if the charter school closes. The procedures shall ensure a final audit of the charter 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 public records.

VI. Additional requirements for County Charter Schools as authorized by Education Code Section 47605.6 listed below as items 1 through 23.

1. The charter school shall meet all statewide standards and conduct pupil assessments required pursuant to Education Code Section 60605 and any other statewide standards authorized in statute or pupil assessments applicable to pupils in non-charter public schools.
2. The charter school shall on a regular basis consult with their parents and teachers regarding the charter school's educational program.
3. The petition shall provide a declaration of whether or not the charter school shall be deemed the exclusive public-school employer of the employees of the charter school for purposes of the Educational Employment Relations Act (Chapter 10.7 (commencing with Section 3540) of Division 4 of Title 1 of the Government Code).
4. The charter school shall employ an attendance accounting process that is approved by the Ventura County Office of Education (VCOE). The attendance accounting process shall additionally be approved by the State of California using the same requirements that exist for all other K-12 public schools. Approvals shall be in writing prior to the first day of operation and any change to the attendance accounting process shall be approved in advance of the change.

5. Annual audits of the charter school shall, in addition to any other standard, be based on any part of the K-12 public school audit guidelines that the VCOE determines should be applied to the charter school. Under no circumstances should an audit take place for the charter school, if the charter school uses independent study that does not use the K-12 public school audit guidelines for independent study.
6. If the charter school uses independent study, the method for determining student to teacher ratio pursuant to California Education Code Section 51745.6 shall be approved by the VCOE prior to the first day of instruction. The student to teacher ratio, pursuant to CCR Title 5 Section 11704, shall not exceed the student to teacher ratio of the largest unified school district in Ventura County rounded down to the nearest whole number. The definition of a “full time equivalent teacher” shall be based on “instructional time” (hours worked and days worked) but will not be based on number of students served. Only fully credentialed teachers working in a direct instructional capacity shall be included in the calculation. At the end of each year, the list of teachers containing the number of full days worked and salary will be provided to the County Superintendent as part of the student to teacher ratio calculation.
7. If the charter school uses any form of non-classroom based instruction, the written policies for independent study (California Education Code Section 51747) shall be approved by the VCOE in addition to the charter school board prior to offering any instruction through non-classroom based instruction. No change shall be made to that policy without first being approved by the VCOE.
8. The petitioner(s) shall submit, with the petition, a copy of the notification provided to the school districts where the petitioner proposes to operate a school facility. The timeline for review of the petition will not commence until the notice has been given and a copy of the notice has been received by the VCOE. If the public hearing cannot be scheduled for a date at least thirty (30) days after notice was given to the affected school districts, and within sixty (60) days of receipt, the petition may be denied for failure of the petitioners to comply with Education Code Section 47605.6(a)(1).
9. The charter school shall maintain insurance policies for all applicable coverages that are in accordance with the requirements of and acceptable to the Ventura County Schools Self-Funding Authority (VCSSFA). Verification and approval of these policies shall take place prior to the beginning of each school year.
10. No provision of the charter petition shall limit the authority that is granted to the VCOE or the VCBE based on statute or regulation at the time the charter was granted or any subsequent statute or regulation.

11. Special Education

- a. The charter school shall establish LEA status for purposes of special education and shall not commence operation until confirmation of LEA status within a SELPA is provided to the VCOE. If the charter school elects to operate as a public school under the VCOE for special education purposes, it shall have an agreement that details the arrangement, signed by the VCOE, and in place prior to the public meeting to consider the charter authorization by the VCBE.
- b. Should any charter school LEA desire to use a contract provider for special education functions including identification, assessment, service provisions, Individualized Education Program development or reviews, or any other compliance areas, the charter school will submit the proposed contract to the Assistant Superintendent of the Ventura County SELPA, and to VCOE or other oversight agency, who will review the proposed contract to assure it contains the levels of detail and direction of responsibility for such duties as required by special education Federal and State laws. The contract/MOU or other agreement shall include as much detail as required to outline and maintain compliance in all areas of required monitoring and Federal, State, SELPA and local district reporting requirements and staffing issues, as well as pertains to provisions of services. Such contracts shall also include all financial agreements and be aligned with the SELPA funding model plan for distribution of special education funding. No contract is valid without the prior written approval of the SELPA and the VCOE or other oversight agency.

12. Oversight

- a. The VCOE, at the expense of the charter school, shall oversee and monitor all charter school operations, and report on same to the VCBE.
- b. The VCOE may enter into an agreement with a third party, as an expense to the charter school, to oversee, monitor and report to the VCBE based on aspects of the charter school's operation determined by the VCOE.
- c. All financial reporting shall be performed using the State of California Standardized Account Code Structure (SACS) and attendant reporting forms including State adopted criteria and standards, annual budget, interim reports, and multi-year projections, all of which shall conform to the timelines required of K-12 school districts.
- d. The charter school must maintain a budget that is viable in its totality for the duration of the charter and maintain a reserve for economic uncertainties consistent with CDE Criteria and Standards for School District Budgets (Exhibit 5).

- e. The charter school shall be required to contract for an annual independent financial audit employing generally accepted accounting principles. The charter school shall select an audit firm with demonstrated experience in education finance acceptable to VCOE.
- f. All public funds generated by the charter school shall be deposited into the County Treasury, and the charter school shall maintain a positive cash balance at all times.
- g. If the charter school contemplates incurring debt, including loans from the State Treasury, it will be required to submit appropriate financial records and repayment plans to VCOE and obtain VCBE approval prior to applying for such loans.
- h. Charter Schools authorized by VCBE will present an annual report to the Board detailing its progress on items agreed upon and detailed in the memorandum of understanding.

13. Sites

- a. “Sites” include school sites, resource centers, meeting space or other satellite facilities.
- b. The charter school may not establish a charter school site either inside or outside the boundaries of Ventura County without approval by the VCBE and an amendment to the charter under Education Code Section 47605.6(a)(3).

14. Any material revision to the charter without approval of the VCBE shall be considered a material violation of the charter and grounds for revocation of the charter. Any revision to the charter shall be considered a material revision, unless the VCOE has determined, in writing, that the change is not a material revision.

15. The resolution of disputes between the charter school and the VCOE (as the oversight representative of the VCBE), including those pursuant to California Education Code Section 47605.6(b)(5)(L), shall be handled in the following manner:

- a. The dispute shall be identified in written format by the administrator of the charter school and the staff member identified as the contact person for the VCOE pursuant to California Education Code Section 47604.32(a). If the dispute could lead to revocation of the charter, this written overview of the dispute shall specifically note such.

- b. VCOE and the individual identified as the representative of the charter school board shall meet and make a good faith attempt to resolve the dispute. Failure of the charter school to promptly respond shall, in itself, be grounds for revocation of the charter pursuant to California Education Code Section 47607(e).
- c. If the VCBE determines it has cause to revoke the charter, it shall notify the charter school and give the school a reasonable opportunity to cure the violation, unless the authority determines, in writing, that the violation constitutes a severe and imminent threat to the health or safety of the pupils. The VCBE shall determine the definition for “a reasonable opportunity to cure the violation”, based on the characteristics of the problem.

16. Petition Deadlines

Completed petitions must be submitted no later than March 1st of the school year preceding the proposed opening of the charter school. Timelines for review will not begin until the submission is considered complete by VCOE as detailed in this administrative regulation and no additional submission of materials relevant to the Board’s review of the petition will be accepted or reviewed by VCOE staff following one week prior to the public hearing.

- 17. The charter shall include a requirement that there be an MOU between the charter school and the VCOE, which MOU shall be in a form required by that office. In the absence of agreement on the MOU, the charter may be revoked.
- 18. The initial term of the approved charter is subject to the sole discretion of the VCBE and may be granted for a period of between one and five years.
- 19. The charter school may form and operate as or by a non-profit public benefit corporation, formed under and pursuant to the non-profit corporation laws of the State of California. If so, it shall apply for and receive tax-exempt status from both the Federal Government and the State of California and shall provide proof of that status to VCOE prior to commencing operations.
- 20. The budget structure used by the charter school, during the petition review process and during operations if a charter is granted, shall be based on, in the format applicable to, standard California public schools, clearly separating costs for certificated and classified staff, and shall separate instructional from non-instructional staff.

21. The charter shall provide a description of the procedures to be used if the charter school closes. In addition, the charter shall specify that, upon closure, the assets of the charter school, remaining after payment of liabilities, shall be distributed to a public agency. The identification of remaining assets shall be the responsibility of the charter school, and the distribution of those assets shall be the responsibility of the VCBE. Given the fact that these funds were intended to benefit K-12 students in Ventura County, the decisions by the VCBE should be consistent with that intent.
22. All contracts for services which exceed two percent (2%) of the annual budget shall be reported to the VCOE before becoming effective.
23. Charter school officers, employees and board members shall be subject to and operate within the provisions of Government Code Sections 1090, et seq, the Political Reform Act, The Open Meetings (Brown) Act, and the Public Records Act.

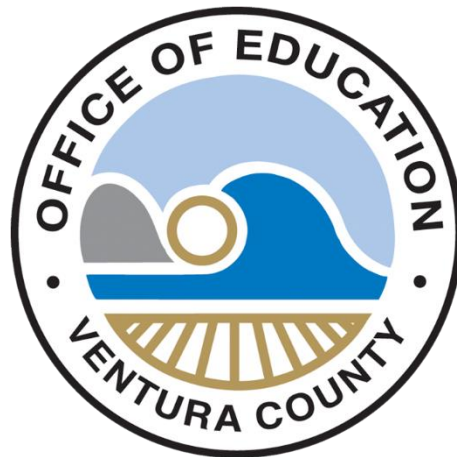
EXHIBIT 2 - Administrative Regulation 0420.4

**CHARTER SCHOOL PETITION PROCESS
for APPEALS, RENEWALS and DIRECT
COUNTYWIDE SUBMISSIONS**

Revised 04/22/19

Ventura County Office of Education

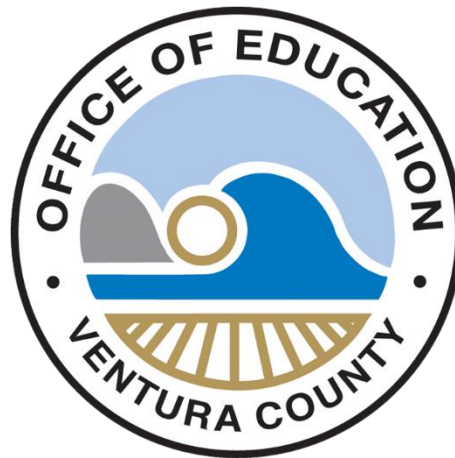
5189 Verdugo Way
Camarillo, CA 93012



Ventura County Office of Education
Student Services Department
5189 Verdugo Way
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(805) 383-1908 Fax

Ventura County Office of Education

5189 Verdugo Way
Camarillo, CA 93012



Stanley C. Mantooth
Ventura County Superintendent of Schools

Charter School Petition Process For Appeals, Renewals and Direct Countywide Submissions

Ventura County Office of Education
Student Services Department
5189 Verdugo Way
Camarillo, CA 93012
(805) 383-1920 Phone
(805) 383-1908 Fax

Charter Petition Review Process

*Petitions Presented Directly to VCBE for the Establishment of a Countywide Charter, Renewals
or on Appeal Following Denial, Non-Renewal or Revocation by a School District*

“The mission of the Ventura County Office of Education is to provide quality services and support for life-long learning opportunities.”

The Board of Education and the staff of the Ventura County Office of Education (VCOE) view the responsibility to provide a quality education to all of the children in Ventura County as a serious undertaking. In that light, we are interested in authorizing only high quality charter schools that:

- Reflect our mission of ensuring the success of all students
- Implement effective approaches to educating students
- Implement effective instructional strategies to serve underperforming populations
- Narrow the achievement gap among students of various backgrounds
- Demonstrate fiscal viability
- Provide sound governance that is free of conflict of interest

The foundational document guiding all charter school operations is the charter. An approved charter is a performance contract between VCOE and the charter school. As such, terms of the contract must be delineated as clearly as possible, especially with regard to student performance measures. A comprehensive, well-written petition provides clear operating procedures for the charter school and objective measures to which VCOE will hold the charter school accountable.

This petition or appeal submission packet is designed to give petitioners a clear outline of what VCOE considers to be a “reasonably comprehensive” charter petition.

A. Submitting the Petition or Appeal

Only complete submission packets will be reviewed.

The charter review timeline becomes effective after all of the required documents outlined below have been submitted to the VCBE at a regularly scheduled board meeting. The VCOE Charter School staff must verify the charter submission packet for completeness prior to the petition being submitted to the VCBE. The VCBE may choose to ratify an earlier submission date for renewals submitted directly to the VCOE Charter School Department.

Contact the VCOE Charter School Department at (805) 383-1931 or mhartsuyker@vcoe.org to schedule an appointment to have your charter submission packet verified at least two weeks prior to the VCBE Meeting in which the petition will be submitted. The timelines for the charter petition review are outlined on page 6.

- ☐ 6 printed copies and one electronic copy of the original Charter Petition, and supporting documents considered by District when petition was denied if an appeal. For renewals, submit charter petition from previous term showing edits and provide clean version of updated renewal petition.
- ☐ VCOE Charter Petition Review Checklist, with page numbers identifying where each of the of components listed is found noted in the left column of the matrix.

Please assemble a binder containing the following items with tabs separating each numbered requirement.

- ☐ 1. Table of Contents
- ☐ 2. Notice of Intent to Submit Application (*See Attached*)
- ☐ 3. Copy of Signature pages (50%) of either parents or teachers meaningfully interested
- ☐ 4. Evidence of the school district board’s action to deny the petition (meeting minutes) **and** written factual findings for denial
- ☐ 5. Proposed budget (start-up, three-year budget projections, and Cash Flow Analysis)
- ☐ 6. A signed certification that the petitioner(s) will comply with all applicable laws
- ☐ 7. A description of any changes to the petition necessary to reflect the county board of education as the chartering entity

Charter Petition Review Process

*Petitions Presented Directly to VCBE for the Establishment of a Countywide Charter, Renewals
or on Appeal Following Denial, Non-Renewal or Revocation by a School District*

B. Petition Review

The petition for a charter school is reviewed utilizing the Ventura County Office of Education "Charter School Petition Review Checklist" presented as a part of this application packet. Charters presented directly to VCBE, renewals or on appeal following denial are reviewed pursuant to all relevant California Education Codes.

Reasonably Comprehensive Description

According to California Code of Regulations, 5 CCR § 11967.5.1 (g) *A reasonably comprehensive description, within the meaning of subdivision (f) of this section and Education Code section 47605(b)(5) shall include, but not be limited to, information that:*

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

The Ventura County Governing Board and the VCOE staff view 5 CCR § 11967.5.1 (g) as meaningful guidelines for reviewing charter applications and have incorporated this guidance into the "Charter School Petition Review Checklist."

C. Petitioner Team Capacity Interview *(At the request of VCOE)*

In addition to a review of the charter petition, VCOE Staff may elect to interview the petitioner team and the Board of Directors to gauge the experience and expertise of its members in the areas of:

- Curriculum, instruction and assessment
- Finance and business operations
- School administration, including on-site leadership and on-site financial management
- School governance

If requested by VCOE, this interview is mandatory and must be attended by members of the petitioner team who have expertise in all of the above areas. If a Board of Directors has been identified, at least two members must attend.

Charter Petition Review Process

*Petition Presented Directly to VCBE for the Establishment of a Countywide Charter, Renewals
or on Appeal Following Denial, Non-Renewal or Revocation by a School District*

D. Ventura County Board of Education Approval Process

Within the guidelines delineated in Education Code § 47605, the Ventura County Board of Education will make a final decision regarding the granting or denial of the charter petition. Petitions may be approved with conditions, including but not limited to the following:

- For a classroom-based program, that a site be secured with an appropriate Certificate of Occupancy 45 days prior to the opening of school
- That the school's student recruitment process not begin until the above condition has been met
- That a qualified principal be hired prior to the opening of the school and that the charter school notify Ventura County Office of Education's Charter Schools Division 45 days prior to the opening of the school
- That the charter school and the Ventura County Board of Education fully execute a Memorandum of Understanding (MOU) and ensure that all required elements have been addressed

The Board of Education will not deny a petition unless it makes written factual findings setting forth specific facts to support one or more of the following:

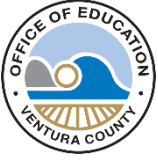
- The charter school presents an unsound educational program for students
- The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition
- The petition does not contain the required number of signatures
- The petition does not contain the necessary affirmations
- The petition does not contain reasonably comprehensive descriptions of the required elements for a charter school
- For renewals, the charter school did not meet the minimum academic renewal standards (Education Code 47607 & 52052(f))

Please do not hesitate to contact the Ventura County Office of Education
If you have any questions about the application process:

Ventura County Office of Education
Student Services Department – Charter School Division
5189 Verdugo Way
Camarillo, CA 93012
(805) 383-1931

Email inquiries can be addressed to:

mhartsuyker@vcoe.org



Notice of Intent to Submit Application
PETITION FOR ESTABLISHMENT OF A CHARTER SCHOOL
Ventura County Office of Education

CHARTER SCHOOL INFORMATION

- ☐ Countywide Charter (47605.6)
☐ Direct Submission to VCBE to Serve Students Otherwise Directly Receiving County Related Services (47605.5)
☐ Appeal after District Denial (47605(j))
 ☐ Start up Charter or ☐ Conversion Charter
☐ Appeal of Non-Renewed Charter (47607.5)
☐ Appeal of Revoked Charter (47607(f))

Name of proposed charter school: _____

General location (including district) of proposed school: _____

Projected grade levels: _____ Projected Enrollment: _____ Goal date for opening school: _____

LEAD PETITIONER CONTACT INFORMATION

Name of lead petitioner: _____

Address: _____ City: _____ Zip: _____

Daytime Phone Numbers: _____ FAX: _____

Email address: _____

_____	_____	_____
_____	_____	_____
_____	_____	_____

CERTIFICATION

I / we certify that we are interested in applying for a Charter School within Ventura County.

Print Name: _____ Signature: _____ Date: _____

OFFICE USE ONLY

Received by:

Print Name: _____ Signature: _____ Date: _____

CHARTER PETITION TIMELINE

Submission Packet for the Establishment of a Charter School
Only complete application packets will be reviewed

<i>Type of Submission</i>					
Action/ Submission	Appeal of District Denial (47605(j)) and Renewals (47607)	County-Wide Charter (47605.6)	Direct County Charter (47605.5)	Appeal of Non- Renewed Charter (47607.5)	Appeal of Revoked Charter (47607(f))
1. All Required items detailed in Section A on page 2 of this packet	Maximum of 180 calendar days from district denial	At discretion of petitioners. Timeline does not begin until submission is complete.	At discretion of petitioners. Timeline does not begin until submission is complete.	30 calendar days from the district's denial action	30 days following the final revocation decision of the district
2. Upon determination that the documents submitted are sufficient, a public hearing is held	30 calendar days from receipt of all required documents	60 calendar days from receipt of all documents	30 calendar days from receipt of all required documents	30 calendar days from receipt of all required documents	30 calendar days from receipt of all required documents
3. Decision by the Ventura County Board of Education	*60 calendar days from receipt of all required documents	*90 calendar days from receipt of all required documents	*60 calendar days from receipt of all required documents	*60 calendar days from receipt of all required documents	*60 calendar days from receipt of all required documents
4. Due Process if Denied by VCBE	Appeal to California Board of Education	None	None	Appeal to California Board of Education	Appeal to California Board of Education

*These dates may be extended by an additional 30 days if both parties agree to the extension.

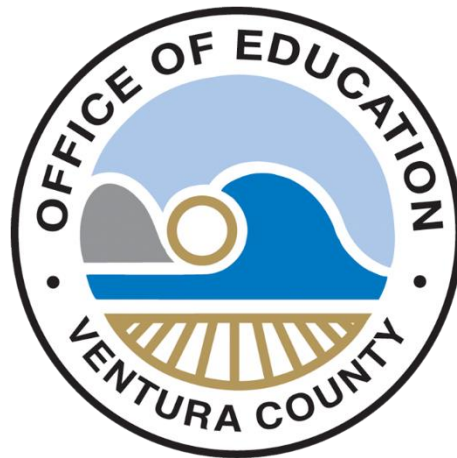
EXHIBIT 3 - Administrative Regulation 0420.4

**CHARTER SCHOOL PETITION REVIEW
CHECKLIST (ED CODE 47605)**

Revised 04/22/19

Ventura County Office of Education

5189 Verdugo Way
Camarillo, CA 93012



Ventura County Office of Education
Student Services Department
5189 Verdugo Way
Camarillo, CA 93012
(805) 383-1920 Phone
(805) 383-1908 Fax

Charter Petition Name: _____

EXHIBIT 3 - Administrative Regulation 0420.4

Revised 04/22/2019



**VENTURA COUNTY OFFICE OF EDUCATION
CHARTER SCHOOL PETITION REVIEW CHECKLIST
(ED CODE 47605)**

- ☐ Initial Petition
☐ Start-Up
☐ Conversion
☐ Renewal Petition

Proposed Charter School		Petitioner Contact Information		Denial Information	Petition Review and Presentation Timelines (Office Use Only)		
Name of Proposed Charter School:	Name:		District Denying Petition:	Petition Presented to VCOE (Maximum of 180 days from denial)	Public Hearing (30 days from receipt)	Decision by Board of Education (60 days from receipt, may be extended 30 days as agreed by petitioner(s) and VCOE)	
	Phone:						
Location(s) of Proposed Charter School:	Address:		Date of Board Action:	Date:	Date Due:	Date Due: <input type="checkbox"/> 30 day extension to:	
	Email:				Date Held:	Date of Board Decision:	
Area of Review		Department(s) Responsible			Name of Reviewer		
A. Required Petition Signatures	Student Services						
B. Required Affirmations	Student Services						
C. Education Program	Educational Services						
D. Measurable Student Outcomes	Educational Services						
E. Student Progress Measurement	Educational Services						
F. Governance Structure	Student Services						
G. Employee Qualifications	Human Resources						
H. Health and Safety Procedures	Human Resources						
I. Racial and Ethnic Balance	Student Services						
J. Admissions Policies and Procedures	Student Services						
K. Annual Financial Audits	Fiscal & Administrative Services/SBAS						
L. Suspension and Expulsion	Student Services						
M. Staff Retirement System	Human Resources						
N. Attendance Alternatives	Student Services						
O. Labor Relations	Human Resources						
P. Dispute Resolution Process	Student Services						
Q. Closure Procedures	Student Services						
R. Exclusive Public-School Employer	Human Resources						
S. Facilities	Student Services						
T. Successful Implementation	VCOE Team						
U. Effective Date	Student Services						
V. Financial & Organizational Accountability	Fiscal & Administrative Services/SBAS						
W. Financial Plan	Fiscal & Administrative Services/SBAS						
X. Special Education/SELPA	Special Education/SELPA						

Instructions to Review Committee: This checklist is designed to guide the review of charter school petitions. Throughout the evaluation, you are asked to rate the petitioner's response to each criteria required for each specific area as **Strong, Sufficient or Insufficient**.

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

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

Strong:

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

Sufficient:

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

Insufficient:

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

Page #	A. REQUIRED PETITION SIGNATURES - ED CODE 47605(a)(1)(A) & (B)	Strong	Sufficient	Insufficient	N/A
	1. Parents/guardians, residing in Ventura County, representing at least 50% of the number of age appropriate students expected to enroll for 1st year of operation, in the form required by law				
Page #	OR	Strong	Sufficient	Insufficient	N/A
	2. Fifty percent of the number of appropriately credentialed teachers expected to be employed during 1st year of operation, in the form required by law				
	Comments:				
Page #	B. REQUIRED AFFIRMATIONS - ED CODE 47605(b)(4)	Strong	Sufficient	Insufficient	N/A
	1. Statement that school will be non-sectarian in its programs, admission policies, employment practices, and all other operations, will not charge tuition, and will not discriminate against any pupil on the basis of ethnicity, national origin, gender, gender identity, gender expression, or disability or on the basis of any of the characteristics listed in Education Code 220				

Page #	CONTINUED: REQUIRED AFFIRMATIONS - ED CODE 47605(b)(4)	Strong	Sufficient	Insufficient	N/A
	Comments:				
	C. EDUCATIONAL PROGRAM – ED CODE 47605 (b)(5)A) <i>The educational program should identify those whom the school is attempting to educate, what it means to be an “educated person” in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling pupils to become self-motivated, competent, and lifelong learner</i>				
Page #	1. Targeted School Populations	Strong	Sufficient	Insufficient	N/A
	a. Age, grade levels and number of students				
	b. Describe students whom the charter will attempt to educate; describe how the charter will improve learning for the targeted population				
	c. Clear and concise Mission Statement that defines the purposes and nature of the charter school				
Page #	2. Attendance	Strong	Sufficient	Insufficient	N/A
	a. Includes school year/day, academic calendar, number of school days and instructional minutes				
	b. Includes attendance expectations and requirements				
Page #	3. What it Means to be an Educated Person in the 21st Century	Strong	Sufficient	Insufficient	N/A
	a. Objective of enabling pupils to become self-motivated, competent, lifelong learners				
	b. Clear list of general academic skills and qualities important for an educated person				
	c. Clear list of general non-academic skills and qualities important for an educated person				
Page #	4. Description of How Learning Best Occurs	Strong	Sufficient	Insufficient	N/A
	a. Framework for instructional design aligned with needs of target population and based upon successful practice and research				
	b. Description of instructional approaches and strategies including curriculum, teaching methods, materials and technology				
	c. Description of learning environment (e.g., site-based, independent study, technology based, etc)				
	d. Discussion of how chosen instructional approach will enable students to achieve objectives specified in the charter and master academic content standards in core curriculum areas				
	e. Proposed program strongly aligned to school's mission.				
	f. Proposal includes, at a minimum, full curriculum for one course or grade level; Proposal also provides that a full curriculum will be submitted prior to the opening of school.				
	g. Describes how charter school will identify and respond to needs of students not achieving at or above expected levels				
	h. Describes how the charter school will identify and respond to needs of students who are academically high achieving				

Page #	CONTINUED: Description of How Learning Best Occurs	Strong	Sufficient	Insufficient	N/A
	i. Describes how charter school will identify and respond to needs of English Learners				
	j. Describes how charter school will identify and respond to needs of students with disabilities, including how it will serve students with moderate/severe disabilities (See Special Education section)				
Page #	5. Annual Goals	Strong	Sufficient	Insufficient	N/A
	a. Annual goals are included for all pupils and for each subgroup or pupils identified pursuant to Section 52052, consistent with characteristics of the students the school intends to serve.				
	b. Goals address identified and applicable state priorities (listed in Ed Code 52060(d) – LCAP				
	c. Includes specific annual actions to achieve the stated goals				
	d. Additional school priorities related to unique aspects of the proposed charter program with goals and specific annual actions.				
Page #	6. Additional Requirements for Charter Schools Serving High School Students	Strong	Sufficient	Insufficient	N/A
	a. How Charter School will inform parents about the transferability of courses to other public high schools				
	b. How Charter School will inform parents about the eligibility of courses to meet college entrance requirements				
	Comments:				
Page #	D. MEASURABLE STUDENT OUTCOMES - ED CODE 47605(b)(5)(B) <i>The outcomes evaluated in this section should represent the school's definition of success. Pupil outcomes means the extent to which all pupils of the school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the school's educational program.</i>	Strong	Sufficient	Insufficient	N/A
	1. Pupil outcomes are clear, specific, and measurable, i.e. specific, assessments listed for each exit outcome				
	2. Pupil outcomes align with applicable state priorities, as described in Ed Code 52060(d) (consistent with LCAP), that apply for the grade levels served and nature of the program.				
	3. Describes how pupil outcomes will address state content and performance standards in core Academics				
	4. Clearly stated exit outcomes including acquisition of academic and non-academic skills				
	5. Affirmation that "benchmark" skills and specific classroom-level skills will be developed				
	6. Affirmation/description: exit outcomes will align to mission, curriculum and assessments				
	7. Affirmation that college-bound students wishing to attend California colleges or universities will have the opportunity to take courses that meet the "A–G" requirements				
	8. Lists school-wide student performance goals students will achieve over a given period of time: projected attendance levels, dropout percentage, graduation rate goals, etc.				
	9. Acknowledges that exit outcomes and performance goals may need to be modified over time				
	10. If high school, graduation requirements defined and WASC accreditation addressed				

Page #	CONTINUED: MEASURABLE STUDENT OUTCOMES - ED CODE 47605(b)(5)(B)	Strong	Sufficient	Insufficient	N/A
	Comments:				
Page #	E. STUDENT PROGRESS MEASUREMENT – ED CODE 47605 (b)(5)(C) & ED CODE 47605 (c)(1) <i>This section evaluates the petitioner's plan for assessing and measuring students' progress in meeting the pupil outcomes, (i.e. does it use both formative and summative evaluations for student performance) and how it will use the assessments to inform instruction</i>	Strong	Sufficient	Insufficient	N/A
	1. At least one assessment method or tool listed for each of the exit outcomes				
	2. Assessments include multiple, valid and reliable measures using traditional/alternative tools to include assessment for all students, including special education students				
	3. Charter School will meet all statewide standards and conduct the pupil assessments required pursuant to Ed Code 60605 and 60851 and any other pupil assessments applicable to pupils in non-charter schools. Assessments shall include all required state and federal assessments (Including SBAC [ELA & Math], CAA [ELA, Math & Science], CAST, ELPAC, VCALPPS and Physical Fitness Test)				
	4. Chosen assessments are appropriate for standards and skills they seek to measure				
	5. Description of how assessments align to mission, exit outcomes, and curriculum				
	6. Describes minimal required performance level necessary to attain each standard				
	7. Outlines plan for collecting, analyzing/utilizing and reporting student/school performance data to school staff, parents/guardians and VCOE, and for utilizing the data continuously to monitor and improve the charter school's educational program				
	Comments:				
Page #	F. GOVERNANCE STRUCTURE – ED CODE 47605(b)(5)(D), 47605(c)(2) & 47604.1 <i>This section should include, but not be limited to, the process to be followed by the school to ensure parental involvement</i>	Strong	Sufficient	Insufficient	N/A
	1. Includes evidence that the organizational technical designs of the governance structure reflect:				
	a. Seriousness of purpose necessary to ensure that the charter school will become and remain a viable enterprise, and demonstrates understanding and assurance of compliance with open meeting requirements				
	b. That there will be active and effective representation of interested parties, including, but not limited to, a meaningful plan for involvement or input of parents/guardians in the governance of the school and consult with their parents, guardians, and teachers regarding the school's educational programs				
	2. Describes key features of governing structure (usually a board of directors) such as:				
	a. Compliance with Brown Act, Public Records Act, Political Reform Act, Government Code Section 1090 and Conflict of Interest Code				

Page #	CONTINUED: GOVERNANCE STRUCTURE – ED CODE 47605(b)(5)(D) & 47605(c)(2)	Strong	Sufficient	Insufficient	N/A
	b. Size/composition of board, board committees and/or advisory councils				
	c. Board's scope of authority/responsibility along with role of school administration				
	d. Method for selecting initial board members along with Board election/appointment and replacement procedure				
	e. Describes how Board will be developed in terms of supplementing necessary skills and providing training in effective board practices				
	3. Clear delineation of roles and responsibilities of parent councils, advisory committees and other supporting groups				
	4. Includes proposed bylaws, basic policies for Board functions, as well as those necessary for opening and operating a school and/or similar documents				
	5. Initial governing board members identified by name or the process to be used to select them				
	6. Clear description of the legal organization of the charter school as a non-profit public benefit corporation, including evidence of non-profit public benefit status				
	7. Commitment to outlining other important legal or operational relationships between school and the VCOE in accordance with the development of a Memorandum of Understanding				
	8. Describes structure for providing business/administrative services including personnel, accounting, payroll, etc.				
	Comments:				
Page #	G. EMPLOYEE QUALIFICATIONS – ED CODE 47605(b)(5)(E) <i>This section evaluates how effective the school's leadership and management structure is likely to be based on the plan for hiring, staffing qualified teachers, and development of procedures and controls regarding the administration of the school.</i>	Strong	Sufficient	Insufficient	N/A
	1. Describes qualifications to be met by those to be employed by school, including standards to be used in hiring teachers, administrators and other school staff.				
	2. Includes general qualifications for various categories of employees and desired professional backgrounds, depth of experience and other qualities to be sought in their selection				
	3. Specifies key positions along with additional qualifications expected of individuals to be selected for these positions				
	4. Defines core academic teachers & affirms they will hold appropriate Commission on Teacher Credentialing certificate, permit or other equivalent document as required by law				
	5. Identifies qualifications of non-certified teachers who teach non-core, non-college prep courses				
	6. A clear plan for recruitment, selection, development and evaluation of staff including the charter school leader				
	7. An approved and public organizational chart delineating board and management roles and lines of authority				

Page #	CONTINUED: EMPLOYEE QUALIFICATIONS – ED CODE 47605(b)(5)(E)	Strong	Sufficient	Insufficient	N/A
	Comments:				
Page #	H. HEALTH AND SAFETY PROCEDURES – ED CODE 47605(b)(5)(F)	Strong	Sufficient	Insufficient	N/A
	1. Affirms that each employee will furnish the school with a criminal background clearance report, as well as proof of freedom from tuberculosis				
	2. Outlines specific health and safety practices addressing such key areas as:				
	a. Mandated Child Abuse Reporting				
	b. Natural disasters and emergencies, including seismic safety (structural integrity and earthquake preparedness)				
	c. Required Immunizations, vision, hearing, and scoliosis health screenings, administration of medications to the same extent as would apply if the students attended a non-charter school				
	d. Zero tolerance for use of drugs and tobacco				
	e. Staff training on emergency and first aid response				
	3. References accompanied by a detailed set of health and safety related policies/procedures, including a Comprehensive School Safety plan, or the date by which they will be adopted and submitted to the VCOE				
	Comments:				
Page #	I. RACIAL AND ETHNIC BALANCE – ED CODE 47605(b)(5)(G) <i>This section evaluates the ways in which the charter school will address efforts to achieve a racial and ethnic balance that is reflective of the general population within the district in which it is proposed to be located.</i>	Strong	Sufficient	Insufficient	N/A
	1. Lists specific practices/policies designed, and that will be implemented, to attract a diverse applicant pool/enrollment.				
	2. Practices and policies appear likely to achieve targeted racial and ethnic balance				
	Comments:				
Page #	J. ADMISSIONS REQUIREMENTS – ED CODE 47605(b)(5)(H)	Strong	Sufficient	Insufficient	N/A
	1. Mandatory assurances regarding non-discriminatory admission procedures				
	2. Admission preferences which are required for conversion charter schools, if applicable.				

Page #	CONTINUED: ADMISSIONS REQUIREMENTS – ED CODE 47605(b)(5)(H)	Strong	Sufficient	Insufficient	N/A
	3. Clearly describes admissions requirements, including any admission preferences. Includes assurances that all admission preferences shall be approved by the chartering authority at a public hearing, shall be consistent with federal law, the California Constitution and Section 200, and preferences shall not result in limiting enrollment access for pupils identified in Ed Code 47605 (d)				
	4. Proposed admissions and enrollment process and timeline, as well as procedures for public random drawings, if necessary.				
	Comments:				
Page #	K. FINANCIAL AUDIT – ED CODE 47605(b)(5)(I)	Strong	Sufficient	Insufficient	N/A
	1. Describes manner in which annual, independent financial audit will be completed by December 15 th following the close of each fiscal year.				
	2. Describes who will be responsible for contracting and overseeing the independent audit				
	3. Specifies that the auditor will have experience in education finance				
	4. Provides scope and timing of audit, as well as required distribution of completed audit to the Ventura County Office of Education, State Controller's Office and California Department of Education				
	5. Process and timeline for resolving audit exceptions and deficiencies to the satisfaction of the Ventura County Office of Education				
	Comments:				
Page #	L. PUPIL SUSPENSION AND EXPULSION – ED CODE 47605(b)(5)(J)	Strong	Sufficient	Insufficient	N/A
	1. Detailed, step-by-step process by which students may be suspended, expelled or otherwise involuntarily removed for any reason and how procedures will comply with federal and state constitutional procedural and substantive due process requirements as outlined in Education Code 47605 (b)(5)(J)				
	2. Reference to a comprehensive set of student disciplinary policies				
	3. 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.				
	4. Policies balance students' rights to due process with responsibility to maintain a safe learning environment				
	5. Explains how policies and procedures regarding suspension and expulsion will be periodically reviewed and modified				

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

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

Page #	CONTNIUED: SUCCESSFUL IMPLEMENTATION	Strong	Sufficient	Insufficient	N/A
	4. If the petitioners have a past history of involvement in charter schools or other educational agencies (public or private), the history is one that the Board of Education regards as successful				
	5. The Petition as a whole shows evidence that the Petitioner understands and is familiar with the requirements of law				
	Comments:				
Page #	U. EFFECTIVE DATE	Strong	Sufficient	Insufficient	N/A
	1. Does the Petition demonstrate that the charter school will commence operation by September 30 of its first year of operation?				
	Comments:				
Page #	V. FINANCIAL & ORGANIZATIONAL ACCOUNTABILITY	Strong	Sufficient	Insufficient	N/A
	1. A detailed review of the annual budget development, implementation and review process including the process by which the charter school leadership and governance team will monitor and report regarding the continuing financial solvency of the school.				
	2. Detailed description of the manner, format and content by which the charter school will regularly report its current and projected financial viability				
	3. Detailed description of the organization, scope and preparation of the following financial documents and reports:				
	a. A preliminary budget on or before July 1 each year.				
	b. An interim financial report, reflecting changes through October 31, on or before December 15 each year.				
	c. A second interim financial report, reflecting changes through January 31, on or before March 15 each year.				
	d. A final unaudited, financial report for the full prior year on or before September 15 each year.				
	4. Description of the process by which the school will comply with all reports required for charter schools by law; includes sending a copy of each required report to VCOE				
	Comments:				

	REQUIRED SUPPLEMENTAL INFORMATION - ED CODE 47605				
Page #	W. FINANCIAL PLAN	Strong	Sufficient	Insufficient	N/A
	1. First year operational budget				
	a. Start-up costs				
	b. Cash flow for first three years				
	c. Financial projections for first three year				
	Comments:				
Page #	2. Planning Assumptions	Strong	Sufficient	Insufficient	N/A
	a. Number/types of students				
	b. Number of staff				
	c. Facilities needs				
	d. Costs of all major items are identified and within reasonable market ranges				
	e. Revenue assumptions in line with state and federal funding guidelines				
	f. Revenue from "soft" sources less than 10% of ongoing operational costs				
	g. Timeline allows window for referenced grant applications to be submitted and funded				
	Comments:				
Page #	3. Start-up Costs	Strong	Sufficient	Insufficient	N/A
	a. Clearly identifies all major start-up costs				
	i. Staffing				
	ii. Facilities				
	iii. Equipment and Supplies				
	iv. Professional Services				
	b. Assumptions in line with overall school design plan				
	c. Identifies potential funding source				
	d. Timeline allows for grant and fundraising money to become available				
	Comments:				
Page #	4. Annual Operating Budget	Strong	Sufficient	Insufficient	N/A
	a. Annual revenues and expenditures clearly identified by source				
	b. Revenue assumptions closely related to applicable state and federal funding formulas				
	c. Expenditure assumptions reflect school design plan				

Page #	CONTINUED: Annual Operating Budget	Strong	Sufficient	Insufficient	N/A
	d. Expenditure assumptions reflect market costs				
	e. "Soft" revenues not critical to solvency				
	f. Strong reserve or projected ending balance (the larger of 3% of expenditures or \$25,000)				
	g. If first year is not in balance, identifies solvency in future years and sources of capital sufficient to cover deficits until the school year when the budget is projected to balance				
	h. Expenditure for general liability, workers compensation & other types of insurance with evidence that petitioners have researched cost and availability: policies to name the VCOE as additional insured and provide hold harmless agreement				
	i. Expenditure sufficient for reasonably expected legal services \$12k-yrs 1-3, \$6.5k-yr. 4, \$6.7k-yr 5				
	j. Expenditure for Special Education excess costs consistent with current experience in the school district/county, including special education staff, related services staff, and legal services				
	k. Expenditure for facilities – if specific facilities not secured, reasonable projected cost				
	Comments:				
Page #	5. Cash Flow Analysis	Strong	Sufficient	Insufficient	N/A
	a. Monthly projection of revenue receipts in line with local/state/federal funding disbursements				
	b. Expenditures projected by month and correspond with typical/reasonable schedules				
	c. Show positive fund balance each month and/or identify sources of working capital				
	Comments:				
Page #	6. Long Term Plan	Strong	Sufficient	Insufficient	N/A
	a. Projects revenues and expenditures for at least two additional years				
	b. Revenue assumptions based on reasonable potential growth in local, state and federal revenues				
	c. Revenue assumptions based on reasonable student growth projections				
	d. Revenue to support meal program as defined in Ed Code Section 49552				
	e. Reasonable cost-of-living and inflation assumptions				
	f. Annual fund balances are positive, or sources of supplemental working capital are identified				
	Comments:				

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

Page #	CONTINUED: Required Elements	Strong	Sufficient	Insufficient	N/A
	k. Statement that any student potentially in need of Section 504 services will be the responsibility of the charter school				
	l. The procedure to be followed when a student with an IEP enrolls in, or transfers out of, the charter school and the notification responsibilities				
	Comments:				
Page #	3. If Charter Will Apply to be its own LEA for Special Education Purposes within SELPA	Strong	Sufficient	Insufficient	N/A
	a. Notify SELPA Director of intent prior to February 1 st of the preceding school year				
	b. Located within Ventura County SELPA geographical boundaries				
	c. Provides current operating budget in accordance with Ed Code 42130 and 42131				
	d. Provides assurances that all students will be instructed in safe environment				
	e. Provides copy of original charter petition and any amendments				
	f. Responsible for any legal fees relating to application and assurances process				
	g. Follows the terms of the "Agreement Regarding the Organization, Implementation, Administration and Operation of the Ventura SELPA"				
	h. Meets the terms of all Ventura SELPA policies and procedures				
	i. Charter fiscally responsible for fair share of any encroachment on general funds				
Page #	4. Overview of how special education funding and services will be provided by:	Strong	Sufficient	Insufficient	N/A
	a. Charter School				
	b. Ventura County Office of Education				
	c. SELPA				
	Comments:				

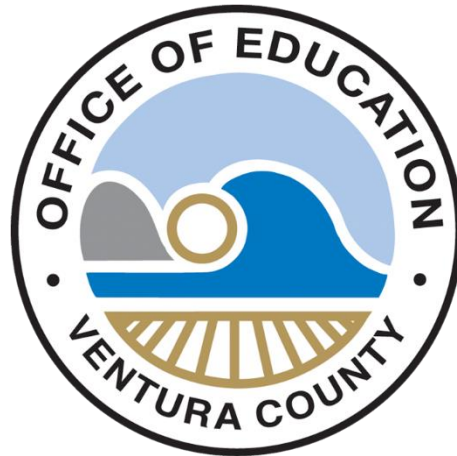
EXHIBIT 4 - Administrative Regulation 0420.4

**COUNTY-WIDE CHARTER SCHOOL
PETITION REVIEW CHECKLIST
(ED CODE 47605.6)**

Revised 04/22/19

Ventura County Office of Education

5189 Verdugo Way
Camarillo, CA 93012



Ventura County Office of Education
Student Services Department
5189 Verdugo Way
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VENTURA COUNTY OFFICE OF EDUCATION
COUNTY-WIDE CHARTER SCHOOL PETITION REVIEW CHECKLIST
(ED CODE 47605.6)

Proposed Charter School		Petitioner Contact Information		Petition Review and Presentation Timelines (Office Use Only)		
Name of Proposed Charter School:	Name:		Complete Petition Received by VCOE	Public Hearing (60 days from receipt)	Decision by Board of Education (90 days from receipt, may be extended 30 days if agreed by petitioner(s) and VCOE)	
	Phone:					
Location(s) of Proposed Charter School:	Address:		Date:	Date Due:	Date Due / extension to:	
	Email:			Date Held:	Date of Board Decision:	
Area of Review		Department(s) Responsible		Name of Reviewer		
A. Required Petition Signatures	Student Services					
B. Required Affirmations	Student Services					
C. Required Findings	Student Services					
D. Education Program	Educational Services					
E. Measurable Student Outcomes	Educational Services					
F. Student Progress Measurement	Educational Services					
G. Governance Structure	Student Services					
H. Employee Qualifications	Human Resources					
I. Health and Safety Procedures	Human Resources					
J. Racial and Ethnic Balance	Student Services					
K. Annual Financial Audits	Fiscal & Administrative Services/SBAS					
L. Suspension and Expulsion	Student Services					
M. Staff Retirement System	Human Resources					
N. Dispute Resolution Process	Student Services					
O. Admissions Requirements	Student Services					
P. Attendance Alternatives	Student Services					
Q. Labor Relations	Human Resources					
R. Closure Procedures	Student Services					
S. Exclusive Public-School Employer	Human Resources					
T. Facilities	Student Services					
U. Successful Implementation	Student Services					
V. Effective Date	Student Services					
W. Financial & Organizational Accountability	Fiscal & Administrative Services/SBAS					
X. Financial Plan	Fiscal & Administrative Services/SBAS					
Y. Special Education/SELPA	Special Education/SELPA					

Charter Petition Name:

Page #	A. REQUIRED PETITION SIGNATURES – ED CODE 47605.6 (a)(1)(A) & (B)	Strong	Sufficient	Insufficient	N/A
	1. Parents/guardians, residing in Ventura County, representing at least 50% of the number of age appropriate students expected to enroll for 1st year of operation, in the form required by law and 30-day notice has been provided to school district(s) in which the charter will operate.				
Page #	OR				
	2. The Petition is signed by at least 50% of the number of teachers that the charter school estimates will be employed at the school during its first year of operation and 30-day notice has been provided to school district(s) in which the charter will operate.				
	Comments:				
Page #	B. REQUIRED AFFIRMATIONS – ED CODE 47605.6 (b)(4)	Strong	Sufficient	Insufficient	N/A
	1. Statement that school will be non-sectarian in its programs, admission policies, employment practices, and all other operations, will not charge tuition, and will not discriminate against any pupil on the basis of ethnicity, national origin, gender, gender identity, gender expression, or disability or on the basis of any of the characteristics listed in Education Code 220.				
	Comments:				
Page #	C. REQUIRED FINDINGS – ED CODE 47605.6 (a) & (b)	Strong	Sufficient	Insufficient	N/A
	1. Granting the charter is consistent with sound educational practice				
	2. Reasonable justification as to why the charter school could not be established by petition to a school district pursuant to California Education Code 47605				
	3. Level of Support of teachers, parents, guardians, and the school district where the charter school petitioners propose to place the school facilities.				
	Comments:				
	D. EDUCATIONAL PROGRAM – ED CODE 47605.6 (b)(5)(A)				
Page #	1. Targeted School Populations	Strong	Sufficient	Insufficient	N/A
	a. Age, grade levels and number of students				
	b. Describe students whom the charter will attempt to educate; describe how the charter will improve learning for the targeted population				

Charter Petition Name:

Page #	CONTINUED: Targeted School Populations	Strong	Sufficient	Insufficient	N/A
	c. Clear and concise Mission Statement that defines the purposes and nature of the charter school				
	Comments:				
Page #	2. Attendance	Strong	Sufficient	Insufficient	N/A
	a. Includes school year/day, academic calendar, number of school days and instructional minutes				
	b. Includes attendance expectations and requirements				
	Comments:				
Page #	3. What it Means to be an Educated Person in the 21 st Century	Strong	Sufficient	Insufficient	N/A
	a. Objective of enabling pupils to become self-motivated, competent, lifelong learners				
	b. Clear list of general academic skills and qualities important for an educated person				
	c. Clear list of general non-academic skills and qualities important for an educated person				
	Comments:				
Page #	4. Description of How Learning Best Occurs	Strong	Sufficient	Insufficient	N/A
	a. Framework for instructional design aligned with needs of target population and based upon successful practice and research				
	b. Description of instructional approaches and strategies including curriculum, teaching methods, materials and technology				
	c. Description of basic learning environment (e.g. site-based, independent study, etc.)				
	d. Discussion of how chosen instructional approach will enable students to achieve objectives specified in the charter and master academic content standards in core curriculum areas				
	e. Proposed program strongly aligned to school's mission.				
	f. Proposal includes, at a minimum, full curriculum for one course or grade level; Proposal also provides that a full curriculum will be submitted prior to the opening of school.				
	g. Describes how charter school will identify and respond to needs of students not achieving at or above expected levels				

Charter Petition Name:

Page #	CONTINUED: Description of How Learning Best Occurs	Strong	Sufficient	Insufficient	N/A
	h. Describes how the charter school will identify and respond to needs of students who are academically high achieving				
	i. Describes how charter school will identify and respond to needs of English Learners				
	j. Describes how charter school will identify and respond to needs of students with disabilities (See Special Education section)				
	Comments:				
Page #	5. Annual Goals	Strong	Sufficient	Insufficient	N/A
	a. Annual goals are included for all pupils and for each subgroup or pupils identified pursuant to Section 52052, consistent with characteristics of the students the school intends to serve.				
	b. Goals address identified and applicable state priorities (listed in Ed Code 52060(d) – LCAP				
	c. Includes specific annual actions to achieve the stated goals				
	d. Additional school priorities related to unique aspects of the proposed charter program with goals and specific annual actions.				
Page #	6. Additional Requirements for Charter Schools Serving High School Students	Strong	Sufficient	Insufficient	N/A
	a. How Charter School will inform parents about the transferability of courses to other public high schools				
	b. How Charter School will inform parents about the eligibility of courses to meet college entrance requirements				
	Comments:				
Page #	E. MEASURABLE STUDENT OUTCOMES – ED CODE 47605.6 (b)(5)(B)	Strong	Sufficient	Insufficient	N/A
	1. Describes clearly measurable outcomes to be used by charter school, e.g., attainment of skills, knowledge and attitudes listed in goals in school educational program				
	2. Pupil outcomes align with applicable state priorities, as described in Ed Code 52060(d) (consistent with LCAP), that apply for the grade levels served and nature of the program				
	3. Describes how pupil outcomes will address state content and performance standards in core Academics				
	4. Clearly stated exit outcomes including acquisition of academic and non-academic skills				
	5. Affirmation that "benchmark" skills and specific classroom-level skills will be developed				

Charter Petition Name:

Page #	CONTINUED: MEASURABLE STUDENT OUTCOMES – ED CODE 47605.6 (b)(5)(B)	Strong	Sufficient	Insufficient	N/A
	6. Affirmation/description: exit outcomes will align to mission, curriculum and assessments				
	7. Affirmation that college-bound students wishing to attend California colleges or universities will have the opportunity to take courses that meet the “A–G” requirements				
	8. Lists school-wide student performance goals students will achieve over a given period of time: projected attendance levels, dropout percentage, graduation rate goals, etc.				
	9. Acknowledges that exit outcomes and performance goals may need to be modified over time				
	10. If high school, graduation requirements defined and WASC accreditation addressed				
	Comments:				
Page #	F. STUDENT PROGRESS MEASUREMENT – ED CODE 47605.6 (b)(5)(C)	Strong	Sufficient	Insufficient	N/A
	1. At least one assessment method or tool listed for each of the exit outcomes				
	2. Assessments include multiple, valid and reliable measures using traditional/alternative tools				
	3. Charter School will meet all statewide standards and conduct the pupil assessments required pursuant to Ed Code 60605 and 60851 and any other pupil assessments applicable to pupils in non-charter schools. Assessments shall include all required state and federal assessments (Including SBAC [ELA & Math], CAA [ELA, Math & Science], CAST, ELPAC, VCALPPS and Physical Fitness Test)				
	4. Chosen assessments are appropriate for standards and skills they seek to measure				
	5. Description of how assessments align to mission, exit outcomes, and curriculum				
	6. Describes minimal required performance level necessary to attain each standard				
	7. Outlines plan for collecting, analyzing/utilizing and reporting student/school performance data to school staff, parents/guardians and VCOE				
	Comments:				
Page #	G. GOVERNANCE STRUCTURE – ED CODE 47605.6 (b)(5)(E)	Strong	Sufficient	Insufficient	N/A
	1. Describes what role parents have in the governance and operation of the school; charter school consults, on a regular basis, with its parents, guardians, and teachers regarding the school’s educational programs				
	2. Describes key features of governing structure (usually a board of directors) such as:				
	a. Compliance with Brown Act, Public Records Act, Political Reform Act, Government Code Section 1090 and Conflict of Interest Code				
	b. Size/composition of board, board committees and/or advisory councils				

Charter Petition Name:

Page #	CONTINUED: GOVERNANCE STRUCTURE – ED CODE 47605.6 (b)(5)(E)	Strong	Sufficient	Insufficient	N/A
	c. Board's scope of authority/responsibility along with role of school administration				
	d. Method for selecting initial board members along with Board election/appointment and replacement procedure				
	e. Describes how Board will be developed in terms of supplementing necessary skills and providing training in effective board practices				
	3. Includes proposed bylaws, basic policies for Board functions, as well as those necessary for opening and operating a school and/or similar documents				
	4. Initial governing board members identified by name or the process to be used to select them				
	5. Clear description of the legal organization of the charter school, as a non-profit public benefit corporation, including evidence of nonprofit public benefit status				
	6. Outlines other important legal or operational relationships between school and the VCOE in accordance with the general contents of an MOU or Operating Agreement				
	7. Describes structure for providing business/administrative services including personnel, accounting, payroll, etc.				
	Comments:				
Page #	H. EMPLOYEE QUALIFICATIONS – ED CODE 47605.6 (b)(5)(F)	Strong	Sufficient	Insufficient	N/A
	1. Describes qualifications to be met by those to be employed by school, including standards to be used in hiring teachers, administrators and other school staff.				
	2. Includes general qualifications for various categories of employees and desired professional backgrounds, depth of experience and other qualities to be sought in their selection				
	3. Specifies key positions in each category, along with additional qualifications expected of individuals to be selected for these positions				
	4. Defines core academic teachers & affirms they will hold appropriate Commission on Teacher Credentialing certificate, permit or other equivalent document				
	5. Identifies teaching positions which are not considered core academic, along with required Qualifications				
	6. A clear plan for recruitment, selection, development and evaluation of staff including the charter school leader				
	7. An approved and public organizational chart delineating board and management roles and lines of authority				
	Comments:				

Charter Petition Name:

Page #	I. HEALTH AND SAFETY PROCEDURES – ED CODE 47605.6 (b)(5)(G)	Strong	Sufficient	Insufficient	N/A
	1. Affirms that each employee will furnish the school with a criminal record summary, as well as proof of freedom from tuberculosis				
	2. Outlines specific health and safety practices addressing such key areas as:				
	a. Mandated Child Abuse Reporting				
	b. Natural disasters and emergencies, including seismic safety (structural integrity and earthquake preparedness)				
	c. Required Immunizations, health screenings, administration of medications				
	d. Zero tolerance for use of drugs and tobacco				
	e. Staff training on emergency and first aid response				
	3. References accompanied by a detailed set of health and safety related policies/procedures, including a Comprehensive School Safety plan, or the date by which they will be adopted and submitted to the VCOE				
	Comments:				
Page #	J. RACIAL AND ETHNIC BALANCE – ED CODE 47605.6 (b)(5)(H)	Strong	Sufficient	Insufficient	N/A
	1. Lists specific practices/policies designed to attract a diverse applicant pool/enrollment.				
	2. Practices and policies appear likely to achieve targeted racial and ethnic balance				
	Comments:				
Page #	K. FINANCIAL AUDIT – (ED CODE 47605.6 (b)(5)(I))	Strong	Sufficient	Insufficient	N/A
	1. Describes manner in which annual, independent financial audit will be completed by December 15 th following the close of each fiscal year.				
	2. Describes who will be responsible for contracting and overseeing the independent audit				
	3. Specifies that the auditor will have experience in education finance				
	4. Provides scope and timing of audit, as well as required distribution of completed audit to the Ventura County Office of Education, State Controller's Office and California Department of Education				
	5. Process and timeline for resolving audit exceptions and deficiencies to the satisfaction of the Ventura County Office of Education				
	Comments:				

Charter Petition Name:

Page #	L. PUPIL SUSPENSION AND EXPULSION – ED CODE 47605.6 (b)(5)(J)	Strong	Sufficient	Insufficient	N/A
	1. Detailed, step-by-step process by which students may be suspended or expelled for disciplinary reasons or otherwise involuntarily removed for any reason and how procedures will comply with federal and state constitutional procedural and substantive due process requirements as outlined in Education Code 47605(b)(5)(J)				
	2. Reference to a comprehensive set of student disciplinary policies				
	3. 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.				
	4. Policies balance students' rights to due process with responsibility to maintain a safe learning environment				
	5. Explains how policies and procedures regarding suspension and expulsion will be periodically reviewed and modified				
	6. Explains how VCOE may be involved in disciplinary matters				
	Comments:				
Page #	M. STAFF RETIREMENT SYSTEM – ED CODE 47605.6 (b)(5)(K)	Strong	Sufficient	Insufficient	N/A
	1. Describes manner by which staff members will be covered by STRS, PERS and/or federal social security; or how the charter school will create a system to address employees' retirement funding				
	2. Specifies specific positions to be covered by each system and staff designated to ensure that arrangements for coverage are made				
	Comments:				
Page #	N. DISPUTE RESOLUTION - ED CODE 47605.6 (b)(5)(L)	Strong	Sufficient	Insufficient	N/A
	1. The petitioner identifies procedures to be followed by the charter school and the entity granting the charter to resolve disputes relating to provisions of the charter				
	2. Outlines process by which charter school will resolve internal complaints and disputes				
	3. Acknowledges that except those disputes between the Authorizer and the school, all disputes involving the school shall be resolved by the school according to its own internal policies				
	Comments:				

Charter Petition Name:

Page #	O. ADMISSIONS REQUIREMENTS - ED CODE 47605.6 (b)(5)(M)	Strong	Sufficient	Insufficient	N/A
	1. Mandatory assurances that the charter school will be non-discriminatory in its admission procedures				
	2. Clearly describe admission requirements, including any admission preferences. Includes assurances that all admission preferences shall be approved by the chartering authority at a public hearing, shall be consistent with federal law, the California Constitution and Section 200 and preferences shall not result in limiting enrollment access for pupils identified in Ed Code 47605.6 (e)				
	3. Proposed admission and enrollment process and timeline, as well as procedures for public random drawings, if necessary				
	Comments:				
Page #	P. PUBLIC SCHOOL ATTENDANCE ALTERNATIVES - ED CODE 47605.6 (b)(5)(N)	Strong	Sufficient	Insufficient	N/A
	1. The Public-school attendance alternatives for pupils residing within the school district who choose not to attend the charter school				
	Comments:				
Page #	Q. LABOR RELATIONS – ED CODE 47605.6 (b)(5)(O)	Strong	Sufficient	Insufficient	N/A
	1. Description of the rights of an employee of the county office of education, upon leaving the employment of the county office of education, to be employed by the charter school, and any rights of return to the county office of education that an employee may have upon leaving the employ of the charter school				
	2. States whether charter or VCOE will be employer for EERA purposes				
	Comments:				
Page #	R. CLOSURE PROCEDURES – ED CODE 47605.6 (b)(5)(P)	Strong	Sufficient	Insufficient	N/A
	1. Outlines a detailed description of the process to be used if the charter school closes				
	2. Process includes a final audit of the charter school, specific plans for disposition of all net assets and liabilities, as well as for the maintenance and transfer of pupil records				
	Comments:				

Charter Petition Name:

Page #	S. EXCLUSIVE PUBLIC-SCHOOL EMPLOYER – ED CODE 47605.6 (b)(6)	Strong	Sufficient	Insufficient	N/A
	1. Petition has a declaration whether or not the charter school shall be deemed the exclusive public-school employer of the employees of the charter school for the purposes of the Educational Employment Relations Act				
	Comments:				
Page #	T. FACILITIES - ED CODE 47605.6 (b)(5)(D)	Strong	Sufficient	Insufficient	N/A
	1. Include the location of each charter school facility which the petitioner proposes to operate				
	2. Describes each charter school facility which the petitioner proposes to operate in terms of safety and educational suitability				
	3. Describes the current and projected availability of each charter school site				
	Comments:				
Page #	U. SUCCESSFUL IMPLEMENTATION	Strong	Sufficient	Insufficient	N/A
	1. The Petition includes a thorough description of the education, work experience, credentials, degrees and certifications of the individuals comprising, or proposed to comprise, the directors, administrators and managers of the proposed charter school				
	2. The Petition includes a list of consultants whom the charter school has engaged, or proposes to engage, for the purpose of developing, operating and evaluating the charter school, together with a thorough description of the qualifications of such consultants.				
	3. Information provided in the petition confirms 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				
	Comments:				
Page #	V. EFFECTIVE DATE	Strong	Sufficient	Insufficient	N/A
	1. Does the Petition demonstrate that the charter school will commence operation by September 30 of its first year of operation?				
	Comments:				

Charter Petition Name:

Page #	W. FINANCIAL & ORGANIZATIONAL ACCOUNTABILITY	Strong	Sufficient	Insufficient	N/A
	1. A detailed review of the annual budget development, implementation and review process including the process by which the charter school leadership and governance team will monitor and report regarding the continuing financial solvency of the school.				
	2. Detailed description of the manner, format and content by which the charter school will regularly report its current and projected financial viability				
	3. Detailed description of the organization, scope and preparation of the following financial documents and reports:				
	a. A preliminary budget on or before July 1 each year.				
	b. An interim financial report, reflecting changes through October 31, on or before December 15 each year.				
	c. A second interim financial report, reflecting changes through January 31, on or before March 15 each year.				
	d. A final unaudited, financial report for the full prior year on or before September 15 each year.				
	4. Description of the process by which the school will comply with all reports required for charter schools by law; includes sending a copy of each required report to VCOE				
	Comments:				
	X. FINANCIAL PLAN				
Page #	1. First year operational budget	Strong	Sufficient	Insufficient	N/A
	a. Start-up costs				
	b. Cash flow for first three years				
	c. Financial projections for first three year				
	Comments:				
Page #	2. Planning Assumptions	Strong	Sufficient	Insufficient	N/A
	a. Number/types of students				
	b. Number of staff				
	c. Facilities needs				
	d. Costs of all major items are identified and within reasonable market ranges				
	e. Revenue assumptions in line with state and federal funding guidelines				
	f. Revenue from "soft" sources less than 10% of ongoing operational costs				
	g. Timeline allows window for referenced grant applications to be submitted and funded				

Charter Petition Name:

Page #	CONTINUED: Planning Assumptions	Strong	Sufficient	Insufficient	N/A
	Comments:				
Page #	3. Start-up Costs	Strong	Sufficient	Insufficient	N/A
	a. Clearly identifies all major start-up costs				
	i. Staffing				
	ii. Facilities				
	iii. Equipment and Supplies				
	iv. Professional Services				
	b. Assumptions in line with overall school design plan				
	c. Identifies potential funding source				
	d. Timeline allows for grant and fundraising money to become available				
	Comments:				
Page #	4. Annual Operating Budget	Strong	Sufficient	Insufficient	N/A
	a. Annual revenues and expenditures clearly identified by source				
	b. Revenue assumptions closely related to applicable state and federal funding formulas				
	c. Expenditure assumptions reflect school design plan				
	d. Expenditure assumptions reflect market costs				
	e. "Soft" revenues not critical to solvency				
	f. Strong reserve or projected ending balance (the larger of 3% of expenditures or \$25,000)				
	g. If first year is not in balance, identifies solvency in future years and sources of capital sufficient to cover deficits until the school year when the budget is projected to balance				
	h. Expenditure for general liability, workers compensation & other types of insurance with evidence that petitioners have researched cost and availability; policies to name the VCOE as also insured and provide hold harmless agreement				
	i. Expenditure sufficient for reasonably expected legal services \$12k-yrs 1-3, \$6.5k-yr. 4, \$6.7k-yr 5				
	j. Expenditure for Special Education excess costs consistent with current experience in the school district/county				
	k. Expenditures for facilities: if specific facilities not secure, reasonable projected cost.				

Charter Petition Name:

Page #	CONTINUED: Annual Operating Budget	Strong	Sufficient	Insufficient	N/A
	Comments:				
Page #	5. Cash Flow Analysis	Strong	Sufficient	Insufficient	N/A
	a. Monthly projection of revenue receipts in line with local/state/federal funding disbursements				
	b. Expenditures projected by month and correspond with typical/reasonable schedules				
	c. Show positive fund balance each month and/or identify sources of working capital				
Page #	6. Long Term Plan	Strong	Sufficient	Insufficient	N/A
	a. Projects revenues and expenditures for at least two additional years				
	b. Revenue assumptions based on reasonable potential growth in local, state and federal revenues				
	c. Revenue assumptions based on reasonable student growth projections				
	d. Revenue to support meal program as defined in Ed Code Section 49552				
	e. Reasonable cost-of-living and inflation assumptions				
	f. Annual fund balances are positive, or sources of supplemental working capital are identified				
	Comments:				
	Y. SPECIAL EDUCATION/SELPA	Strong	Sufficient	Insufficient	N/A
Page #	1. Plan for Comprehensive Special Education Program				
	a. Identifies whether the charter will operate special education programs as a school under the chartering authority or will apply to be its own LEA for special education purposes				
	b. Provides that the charter school will assume full responsibility for appropriate programs, services, accommodations and modifications to address the needs of the student				
	c. The petition acknowledges the responsibility of the charter school to provide special education instruction and related services to the students enrolled in the school regardless of students' district of residence				
	d. Has consulted with the Ventura County SELPA Assistant Superintendent prior to submission of the charter petition				
	e. Describes how special education services will be provided consistent with Ventura SELPA Plan and/or policies and procedures				
	f. Includes fiscal allocation plan for providing special education services				

Charter Petition Name:

Page #	CONTINUED: Plan for Comprehensive Special Education Program				
	i. Discussed special education responsibilities of charter				
	ii. Discussed application of SELPA policies				
	iii. Discussed the procedure the charter school will follow if it is unable to provide the appropriate special education programs/services at the charter school site to ensure students receive the appropriate programs/services funded by the charter, including services for moderate to severe students				
	Comments:				
Page #	2. Required Elements	Strong	Sufficient	Insufficient	N/A
	a. Clarifies in charter or an MOU the responsibilities of each party for special education service delivery				
	b. Describes process for referrals				
	c. Outlines methods of assessment				
	d. Provides comprehensive description of instructional program for special education students				
	e. Describes plan for notification and implementation of due process rights				
	f. Provides agreements describing allocation of actual and excess costs				
	g. Provides assurances that charter will be fiscally responsible for fair share of any encroachment on general funds				
	h. Includes assurances that the charter will comply with all provisions of IDEA				
	i. Includes assurances that no student will be denied admission based on disability or lack of available services				
	j. Describes implementation of a Student Study Team process				
	k. Statement that any student potentially in need of Section 504 services will be the responsibility of the charter school				
	l. The procedure to be followed when a student with an IEP enrolls in, or transfers out of, the charter school and the notification responsibilities				
	Comments:				
Page #	3. If Charter Will Apply to be its own LEA for Special Education Purposes within SELPA	Strong	Sufficient	Insufficient	N/A
	a. Notifies SELPA Director of intent prior to February 1 st of the preceding school year				
	b. Located within Ventura County SELPA geographical boundaries				
	c. Provides current operating budget in accordance with Ed Code 42130 and 42131				

Charter Petition Name:

Page #	CONTINUED: If Charter Will Apply to be its own LEA for Special Education Purposes within SELPA	Strong	Sufficient	Insufficient	N/A
	d. Provides assurances that all students will be instructed in safe environment				
	e. Provides copy of original charter petition and any amendments				
	f. Responsible for any legal fees relating to application and assurances process				
	g. Follows the terms of the "Agreement Regarding the Organization, Implementation, Administration and Operation of the Ventura SELPA"				
	h. Meets the terms of all Ventura SELPA policies and procedures				
	i. Charter fiscally responsible for fair share of any encroachment on general funds				
	Comments:				
Page #	4. Overview of how special education funding and services will be provided by:	Strong	Sufficient	Insufficient	N/A
	a. Charter School				
	b. Ventura County Office of Education				
	c. SELPA				
	Comments:				

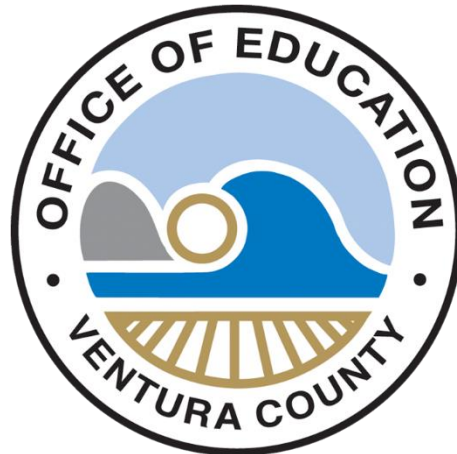
EXHIBIT 5 - Administrative Regulation 0420.4

**CRITERIA and STANDARDS for
REVIEWING SCHOOL DISTRICT /
CHARTER BUDGETS**

Revised September 2018

Ventura County Office of Education

5189 Verdugo Way
Camarillo, CA 93012



Ventura County Office of Education
Student Services Department
5189 Verdugo Way
Camarillo, CA 93012
(805) 383-1920 Phone
(805) 383-1908 Fax

Criteria and Standards For Reviewing School District / Charter Budgets

Criteria Information: Budgets

Deviations from the standards must be explained, and may affect the approval of the budget.

Criterion	Standard
1. Average Daily Attendance	Funded average daily attendance (ADA) has not been overestimated in the first prior fiscal year or in two or more of the previous three fiscal years by more than the following percentage levels: <ul style="list-style-type: none">• 3.0% for districts with 0 to 300 ADA• 2.0% for districts with 301 to 1,000 ADA• 1.0% for districts with 1,001 and over ADA
2. Enrollment	Projected enrollment has not been overestimated in the first prior fiscal year or in two or more of the previous three fiscal years by more than the following percentage levels: <ul style="list-style-type: none">• 3.0% for districts with 0 to 300 ADA• 2.0% for districts with 301 to 1,000 ADA• 1.0% for districts with 1,001 and over ADA
3. ADA to Enrollment	Projected second period ADA to enrollment ratio for any of the budget year or two subsequent fiscal years has not increased from the historical average ratio from the three prior fiscal years by more than one half of one percent.
4. Local Control Funding Formula (LCFF) Revenue	Projected LCFF revenue for any of the budget year or two subsequent fiscal years has not changed from the prior fiscal year by more than the change in population, plus the district's gap funding or cost-of-living adjustment (COLA) ¹ and its economic recovery target payment, plus or minus one percent.
5. Salaries and Benefits	Projected ratio of total unrestricted salaries and benefits to total unrestricted general fund expenditures for any of the budget year or two subsequent fiscal years has not changed from the historical average ratio from the three prior fiscal years by more than the greater of three percent or the district's required reserves percentage.

Criterion	Standard
6. Other Revenues and Expenditures	<p>Projected operating revenues (including federal, other state and other local) or expenditures (including books and supplies, and services and other operating), for any of the budget year or two subsequent fiscal years, have not changed from the prior fiscal year amount by more than the percentage change in population and the funded COLA plus or minus ten percent.</p> <p>For each major object category, changes that exceed the percentage change in population and the funded COLA plus or minus five percent must be explained.</p>
7. Facilities Maintenance	<p>Confirm that the annual contribution for facilities maintenance funding is not less than the amount required pursuant to Education Code Section 17070.75, if applicable, and that the district is providing adequately to preserve the functionality of its facilities for their normal life in accordance with Education Code sections 52060(d)(1) and 17002(d)(1).</p>
8. Deficit Spending	<p>Unrestricted deficit spending (total unrestricted expenditures and other financing uses is greater than total unrestricted revenues and other financing sources) as a percentage of total unrestricted expenditures and other financing uses, has not exceeded one-third of the district's available reserves² as a percentage of total expenditures and other financing uses³ in two out of three prior fiscal years.</p>
9. Fund Balance	<p>Budgeted beginning unrestricted general fund balance has not been overestimated for two out of three prior fiscal years by more than the following percentage levels⁴:</p> <ul style="list-style-type: none"> • 1.7% for districts with 0 to 300 ADA • 1.3% for districts with 301 to 1,000 ADA • 1.0% for districts with 1,001 to 30,000 ADA • 0.7% for districts with 30,001 to 400,000 ADA • 0.3% for districts with 400,001 and over ADA
10. Reserves	<p>Available reserves² for any of the budget year or two subsequent fiscal years are not less than the following percentages or amounts as applied to total expenditures and other financing uses³:</p> <ul style="list-style-type: none"> • the greater of 5% or \$67,000 for districts with 0 to 300 ADA • the greater of 4% or \$67,000 for districts with 301 to 1,000 ADA • 3% for districts with 1,001 to 30,000 ADA • 2% for districts with 30,001 to 400,000 ADA • 1% for districts with 400,001 and over ADA

Footnote References

¹ Districts that are already at or above their LCFF target funding level as described in Education Code Section 42238.03(d) receive no gap funding. These districts have a COLA applied to their LCFF target, but their year-over-year revenue increase might be less than the statutory COLA due to certain local factors and components of the funding formula.

² Available reserves are the unrestricted amounts in the Reserve for Economic Uncertainties and the Unassigned/Unappropriated accounts in the General Fund and Special Reserve Fund for Other Than Capital Outlay Projects. Available reserves will be reduced by any negative ending balances in restricted resources in the General Fund.

³ A school district that is the Administrative Unit of a Special Education Local Plan Area may exclude from its expenditures the distribution of funds to its participating members.

⁴ Percentage levels equate to a rate of deficit spending which would eliminate recommended reserves for economic uncertainties over a three-year period.

Supplemental Information: Budgets

Provide methodology and assumptions used to estimate ADA, enrollment, revenues, expenditures, reserves and fund balance, and multiyear commitments (including cost-of-living adjustments).

Provide information on additional indicators as requested.

Supplemental Information	Provide supplemental information as follows:
S1. Contingent Liabilities	Identify any known or contingent liabilities from financial or program audits, state compliance reviews, litigation, etc., that may impact the budget.
S2. Use of One-Time Revenues for Ongoing Expenditures	Identify any ongoing general fund expenditures in excess of one percent of the total general fund expenditures that are funded with one-time resources in the budget year, and explain how the one-time resources will be replaced to continue funding the ongoing expenditures in the following fiscal years.
S3. Use of Ongoing Revenues for One-time Expenditures	Identify any large non-recurring general fund expenditures that are funded with ongoing general fund revenues.
S4. Contingent Revenues	Identify projected revenues for the budget year and two subsequent fiscal years that are contingent on reauthorization by the local government, special legislation, or other definitive act (e.g. parcel taxes). If any of these revenues are dedicated for ongoing expenses, explain how the revenues will be replaced or the expenditures reduced.
S5. Contributions	Identify projected transfers to or from the general fund to cover operating deficits in either the general fund or any other fund for the budget year and two subsequent fiscal years. Provide an explanation if transfers have changed from the prior fiscal year amounts by more than \$20,000 and more than ten percent. Explanation should include whether transfers are ongoing or one-time in nature. Estimate the impact of any capital projects on the general fund operational budget.
S6. Long-term Commitments	Identify all existing and new multiyear commitments and their annual required payment for the budget year and two subsequent fiscal years. Explain how any increase in annual payments will be funded. Also explain how any decrease to funding sources used to pay long-term commitments will be replaced.
S7. Unfunded Liabilities	Estimate the unfunded liability for post-employment benefits other than pensions (OPEB) based on an actuarial valuation, if required, or other method; identify or estimate the annual required contribution; and indicate how the obligation is funded (pay-as-you-go, amortized over a specific period, etc.). Estimate the unfunded liability for self-insurance programs such as workers' compensation based on an actuarial valuation, if required, or other method; identify or estimate the required contribution; and indicate how the obligation is funded (level of risk retained, funding approach, etc.).

Supplemental Information	Provide supplemental information as follows:
S8. Status of Labor Agreements	<p>Analyze the status of employee labor agreements.</p> <p>Identify new labor agreements, as well as new commitments provided as part of previously ratified multiyear agreements; and include all contracts, including all administrator contracts (and including all compensation). For new agreements, indicate the date of the required board meeting.</p> <p>Compare the increase in new commitments to the projected increase in ongoing revenues and explain how these commitments will be funded in future fiscal years.</p> <p>If salary and benefit negotiations are not finalized at budget adoption, upon settlement with certificated or classified staff:</p> <ul style="list-style-type: none"> • The school district must determine the cost of the settlement, including salaries, benefits, and any other agreements that change costs, and provide the county office of education with an analysis of the cost of the settlement and its impact on the operating budget. • The county superintendent shall review the analysis relative to the criteria and standards and may provide written comments to the president of the district governing board and superintendent.
S9. Local Control and Accountability Plan (LCAP)	Confirm that the school district's governing board has adopted an LCAP or an update to the LCAP effective for the budget year.
S10. LCAP Expenditures	Confirm that the budget includes the expenditures necessary to implement the LCAP or annual update to the LCAP.