



## VENTURA COUNTY OFFICE OF EDUCATION CHARTER SCHOOL APPEAL PETITION REVIEW CHECKLIST

☐ Initial Petition  
☐ 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:	<b>Petition Presented to VCOE</b> (Maximum of 180 days from denial)	<b>Public Hearing</b> (Prior to Action)	<b>Decision by Board of Education</b> (60 days from receipt, may be extended 30 days of 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. Measureable Student Outcomes	Educational Services				
E. Student Progress Measurement	Educational Services				
F. Government Structure	Student Services				
G. Employee Qualifications	Human Resources				
H. Health and Safety Procedures	Human Resources				
I. Racial and Ethnic Balance	Student Services				
J. Admissions Requirements	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. Exclusive Public School Employer	Human Resources				
R. Closure Procedures	Student Services				
S. Assessments/Parent Involvement	Student Services				
T. Facilities	Student Services				
U. Successful Implementation	VCOE Team				
V. Effective Date	Student Services				
W. Financial & Organizational Accountability	Fiscal & Administrative Services/SBAS				

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X. Financial Plan	Fiscal & Administrative Services/SBAS				
Y. Special Education/SELPA	Special Education/SELPA				
Page #	<b>A. REQUIRED PETITION SIGNATURES (Education Code 47605(a)(1)(A) &amp; (B))</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				
	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.				
	<b>Comments:</b>				
Page #	<b>B. REQUIRED AFFIRMATIONS (Education Code 47605(d)(1))</b>	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				
	<b>Comments:</b>				
	<b>C. EDUCATIONAL PROGRAM – (ED CODE 47605 A)</b>				
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 21 <sup>st</sup> 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 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				

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	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				
	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)				
	<b>Comments:</b>				
Page #	<b>5. Additional Requirements for Charter Schools Serving High School Students</b>	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				
	<b>Comments:</b>				
Page #	<b>D. MEASURABLE STUDENT OUTCOMES AND OTHER USES OF DATA – (ED CODE 47605B)</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. Describes how pupil outcomes will address state content and performance standards in core Academics				
	3. Clearly stated exit outcomes including acquisition of academic and non-academic skills				
	4. Affirmation that "benchmark" skills and specific classroom-level skills will be developed				
	5. Affirmation/description: exit outcomes will align to mission, curriculum and assessments				
	6. 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				
	7. Lists school-wide student performance goals students will achieve over a given period of time: projected attendance levels, dropout percentage, graduation rate goals, etc.				
	8. Acknowledges that exit outcomes and performance goals may need to be modified over time				
	9. If high school, graduation requirements defined and WASC accreditation addressed				
	<b>Comments:</b>				
Page #	<b>E. STUDENT PROGRESS MEASUREMENT – (ED CODE 47605 C)</b>	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. Assessment tools include all required state and federal assessments (Including STAR, API, AYP, CAHSEE, CELDT and physical performance test )				
	4. Chosen assessments are appropriate for standards and skills they seek to measure				

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	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				
	<b>Comments:</b>				
<b>Page #</b>	<b>F. GOVERNANCE STRUCTURE – (ED CODE 47605 D)</b>	<b>Strong</b>	<b>Sufficient</b>	<b>Insufficient</b>	<b>N/A</b>
	1. Describes what role parents have in the governance and operation of the school				
	2. Describes key features of governing structure (usually a board of directors) such as:				
	3. Compliance with Brown Act, Public Records Act and Conflict of Interest Policy				
	4. Size/composition of board, board committees and/or advisory councils				
	5. Board's scope of authority/responsibility along with role of school administration				
	6. Method for selecting initial board members along with Board election/appointment and replacement procedure				
	7. Describes how Board will be developed in terms of supplementing necessary skills and providing training in effective board practices				
	8. Includes proposed bylaws, basic policies for Board functions, as well as those necessary for opening and operating a school and/or similar documents				
	9. Initial governing board members identified by name or the process to be used to select them				
	10. Clear description of the legal organization of the charter school including evidence of non profit public benefit status, if applicable				
	11. Outlines other important legal or operational relationships between school and the VCOE in accordance with the general contents of an MOU or Operating Agreement				
	12. Describes structure for providing business/administrative services including personnel, accounting, payroll, etc.				
	<b>Comments:</b>				
<b>Page #</b>	<b>G. EMPLOYEE QUALIFICATIONS – (ED CODE 47605 E)</b>	<b>Strong</b>	<b>Sufficient</b>	<b>Insufficient</b>	<b>N/A</b>
	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; provides specific credentials to be required along with discussion of how this will satisfy requirements for "highly qualified teachers" under the No Child Left Behind Act				
	5. Identifies teaching positions which are not considered core academic, along with required Qualifications				
	<b>Comments:</b>				

Page #	H. HEALTH AND SAFETY PROCEDURES – (ED CODE 47605 F)	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. Seismic safety (structural integrity and earthquake preparedness)				
	b. Natural disasters and emergencies				
	c. 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 or the date by which they will be adopted and submitted to the VCOE				
	<b>Comments:</b>				
Page #	I. RACIAL AND ETHNIC BALANCE – (ED CODE 47605 G)	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				
	<b>Comments:</b>				
Page #	J. ADMISSIONS REQUIREMENTS – (ED CODE 47605 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.				
	3. Clearly describes admissions requirements, including any admission preferences.				
	4. Proposed admissions and enrollment process and timeline, as well as procedures for public random drawings, if necessary.				
	<b>Comments:</b>				
Page #	K. FINANCIAL AUDIT – (ED CODE 47605 I)	Strong	Sufficient	Insufficient	N/A
	1. Describes manner in which annual, independent financial audit will be completed by December 15 <sup>th</sup> 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				
	<b>Comments:</b>				
Page #	L. PUPIL SUSPENSION AND EXPULSION – (ED CODE 47605 J)	Strong	Sufficient	Insufficient	N/A
	1. Detailed, step-by-step process by which students may be suspended or expelled				
	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.				

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	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				
	<b>Comments:</b>				
Page #	<b>M. STAFF RETIREMENT SYSTEM – (ED CODE 47605 K)</b>	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				
	<b>Comments:</b>				
Page #	<b>N. PUBLIC SCHOOL ATTENDANCE ALTERNATIVES – (ED CODE 47605 L)</b>	Strong	Sufficient	Insufficient	N/A
	1. The public school attendance alternatives for pupils residing within the school district who choose not to attend charter schools				
	<b>Comments:</b>				
Page #	<b>O. LABOR RELATIONS – (ED CODE 47605 M)</b>	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				
	<b>Comments:</b>				
Page #	<b>P. DISPUTE RESOLUTION – (ED CODE 47605 N)</b>	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				
	<b>Comments:</b>				
Page #	<b>Q. EXCLUSIVE PUBLIC SCHOOL EMPLOYER – ED CODE 47605 O)</b>	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.				
	<b>Comments:</b>				
Page #	<b>R. CLOSURE PROCEDURES – (ED CODE 47605 P)</b>	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				
	<b>Comments:</b>				

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ADDITIONAL REQUIRED INFORMATION (Education Code 47605 (c) (1-2))					
Page #	<b>S. ASSESSMENTS / PARENT INVOLVEMENT</b>	Strong	Sufficient	Insufficient	N/A
	1. Charter School will meet all statewide standards and conduct the pupil assessments required pursuant to Sections 60605 and 60851 and any other statewide authorized in statute or pupil assessments applicable to pupils in non charter schools				
	2. Charter schools shall, on a regular basis, consult with their parents, guardians, and teachers regarding the school's educational programs				
	<b>Comments:</b>				
Page #	<b>T. FACILITIES</b>	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.				
	<b>Comments:</b>				
Page #	<b>U. SUCCESSFUL IMPLEMENTATION</b>	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?				
	<b>Comments:</b>				
Page #	<b>V. EFFECTIVE DATE</b>	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?				
	<b>Comments:</b>				
Page #	<b>W. FINANCIAL &amp; ORGANIZATIONAL ACCOUNTABILITY</b>	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.				



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	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				
	<b>Comments:</b>				
	<b>X. FINANCIAL PLAN</b>				
Page #	<b>1. First year operational budget</b>	Strong	Sufficient	Insufficient	N/A
	a. Start-up costs				
	b. Cash flow for first three years				
	c. Financial projections for first three year				
	<b>Comments:</b>				
Page #	<b>2. Planning Assumptions</b>	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				
	<b>Comments:</b>				
Page #	<b>3. Start-up Costs</b>	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				
	<b>Comments:</b>				
Page #	<b>4. Annual Operating Budget</b>	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				



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	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-yr 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				
	<b>Comments:</b>				
Page #	<b>5. Cash Flow Analysis</b>	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				
	<b>Comments:</b>				
Page #	<b>6. Long Term Plan</b>	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. Reasonable cost-of-living and inflation assumptions				
	e. Annual fund balances are positive or sources of supplemental working capital are identified				
	<b>Comments:</b>				
Page #	<b>Y. SPECIAL EDUCATION/SELPA (VENTURA COUNTY SELPA CHARTER SCHOOL POLICY)</b>	Strong	Sufficient	Insufficient	N/A
	1. Identifies whether the charter will be an independent LEA for special education purposes				
	2. Has consulted with the Ventura County SELPA Director				
	a. Discussed special education responsibilities of charter				
	b. Discussed application of SELPA policies				
	3. Describes how special education services will be provided consistent with Ventura SELPA Plan and/or policies and procedures				
	a. Includes fiscal allocation plan				
Page #	<b>4. If charter not an independent LEA:</b>	Strong	Sufficient	Insufficient	N/A
	a. Clarifies in charter or an MOU the responsibilities of each party for service delivery				
	1. Referral				
	2. Assessment				

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	3. Instruction				
	4. Due Process				
	5. Agreements describing allocation of actual and excess costs				
	6. Charter fiscally responsible for fair share of any encroachment on general funds				
Page #	5. If charter is LEA within SELPA	Strong	Sufficient	Insufficient	N/A
	a. Notifies SELPA Director of intent prior to February 1 <sup>st</sup> 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 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. Meets 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 #	6. Petition includes the following assurances:	Strong	Sufficient	Insufficient	N/A
	a. The charter will comply with all provisions of IDEA				
	b. No student will be denied admission based on disability or lack of available services				
	c. Will implement a Student Study Team process				
	d. Any student potentially in need of Section 504 services will be the responsibility of the charter school				
	7. Petition/MOU describes the process for notifying district of residence and the VCOE when a special education student enrolls, becomes eligible, ineligible and/or leaves the charter school.				
Page #	8. 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				
	9. Petition/MOU describes the transition to or from a district when a student with an IEP enrolls in, or transfers out of, the charter school				
	Comments:				