

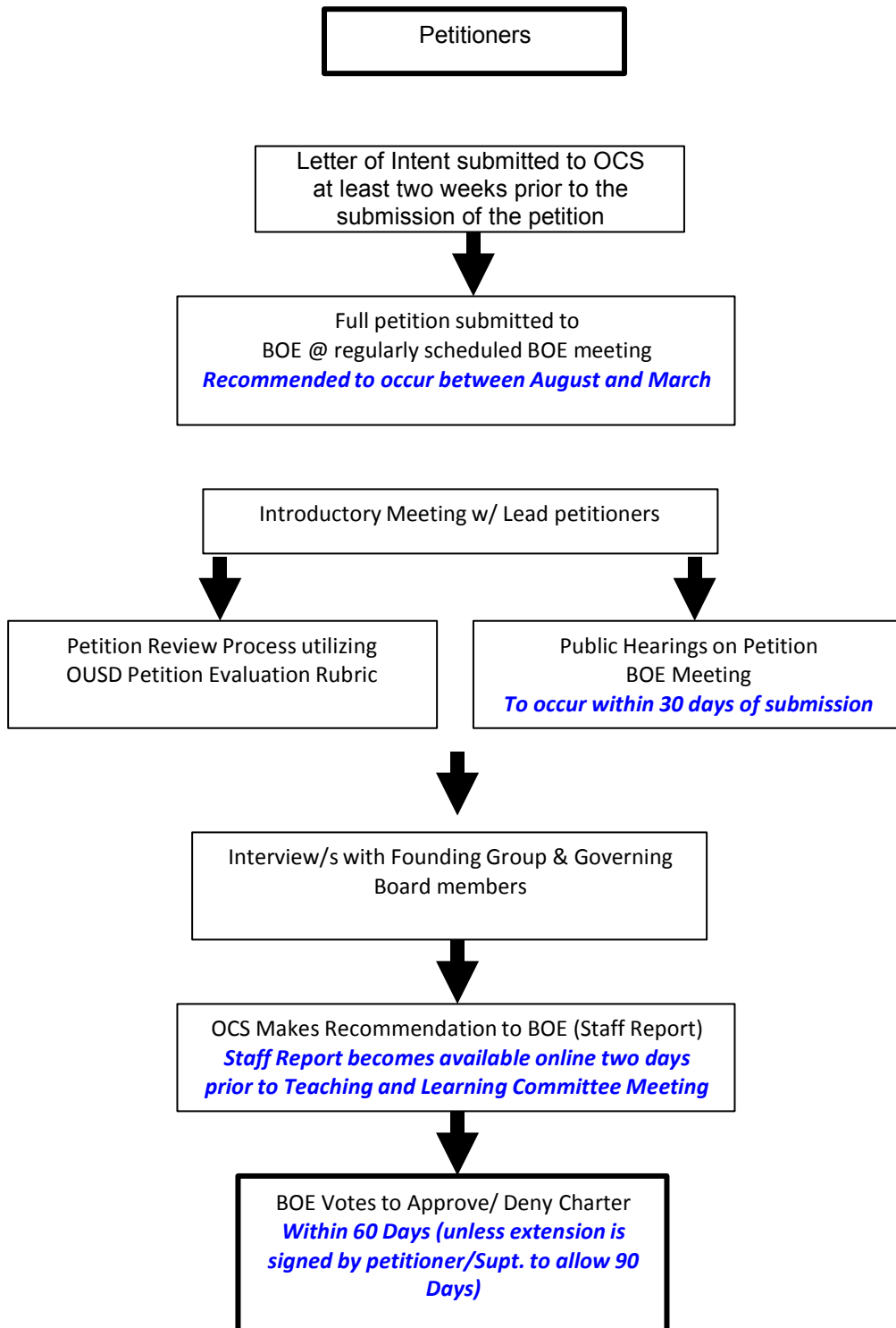
Location: Office of Charter Schools

## **Introductory Meeting Agenda**

- I. Introductions
- II. Petition/Petitioner Background
- III. Petition Evaluation Process Overview
  - o Charter Petitioner Process
  - o Charter Petition Internal Process
- IV. Key Documents
  - o Petitioner Interview Attendees Forms-Governing Board/CMO and Founding Group
  - o Due Diligence Instructions & Questionnaire
  - o Extension Form
  - o Letter of intent\*
  - o Certification Statement\*
  - o Statement of Assurances\*
  - o Charter School Roster of Key Contacts\*
- V. Next Steps
  - o Return required documents
  - o Finalize interview scheduling
  - o Receive dated timeline
  - o Receive Public Hearing information
- VI. Q&A

\*Relevant only if not previously submitted

## CHARTER SCHOOL PETITION PROCESS TIMELINE



## CHARTER SCHOOL PETITIONER INTERVIEW PROCESS

<b>Interviews</b>	<p><b>Interview with Lead Petitioners/Founding Governing Board</b></p> <p>Office of Charter School staff will conduct an interview with the lead petitioners and proposed Governing Board members for each proposed school (charter petition). Comments from the petition review teams assigned to review each petition, public hearings, and elements drawn from the 16 elements of the California Charter Schools Act will serve as a basis for the interview. This interview will be one piece of data that the Board considers when approving or denying charter petitions, pursuant to Education Code 47605 (b)(1)(2)*.</p>
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Who	Petitioner	Office of Charter Schools
<b>1<sup>st</sup> Interview</b>	<ul style="list-style-type: none"> <li>Lead Petitioners/Founding Group*</li> <li>Proposed school site administrator/s</li> </ul> <p><b>*Participants should only be those individuals who will be directly responsible for the implementation of the proposed charter school.</b></p>	<ul style="list-style-type: none"> <li>Director of Quality Diverse Providers, Office of Charter Schools</li> <li>Office of Charter Schools Compliance Specialist</li> <li>Petition Review Team Members (if available)</li> </ul>
<b>2<sup>nd</sup> Interview</b>	<ul style="list-style-type: none"> <li>Proposed Governing Board members</li> </ul>	
<b>What</b>	Answering of questions generated through the petition review process, as well as those that surfaced during the Public Hearing. Questions may cover governance and management, educational program, fiscal oversight, and general capacity to fulfill the elements described in the proposed charter school design and plan.	Will pose questions that allow the petitioners to demonstrate their will, skill and capacity to successfully implement elements described in the proposed charter and achieve the proposed measurable pupil outcomes outlined within the proposed charter.
<b>When</b>	To occur no later than 15 calendar days prior to the regularly scheduled Board of Education meeting at which Petition request must be reviewed and decided upon.	
<b>Where</b>	Office of Charter School Educational Center at Tilden 4551 Steele Street, Rm 9* Oakland, CA 94619 *Please have all attendees check-in in Rm 9, at which point they will be directed to the interview location.	
<b>How</b>	<ol style="list-style-type: none"> <li>Interview to be facilitated by the Director of Quality Diverse Providers, Office of Charter Schools</li> <li>Office of Charter Schools' staff will contact Lead Petitioner using the contact information provided in the Petitioner Information Sheet to schedule the interview date.</li> <li><b>Lead Petitioner must return the Petitioner Interview Attendees Form no later than 5 calendar days following the introductory meeting. This may be hand-delivered or scanned and emailed to <a href="mailto:Kamala.Puligandla@ousd.k12.ca.us">Kamala.Puligandla@ousd.k12.ca.us</a></b></li> <li>Interviews will last approximately two hours each.</li> <li>Resulting responses from Lead Petitioner/s and Governing Board members may be incorporated into the overall evaluation of the charter petition and the assessment of the capacity of the petitioners to successfully implement the proposed charter</li> </ol>	

- EC 47605 (b)(1)(2)
  - (1) The charter school presents an unsound educational program for the pupils to be enrolled in the

charter school.

(2) The petitioners are demonstrably unlikely to successfully implement the program set forth in the petition.

### THE PETITION PROCESS AND REVIEW STAGES

<b>Instructions</b>	All submissions should be prepared double-sided on plain, 8 ½ x 11” sized paper that is suitable for reproduction. Brevity, specificity, and clarity are strongly encouraged.
<b>Deadlines</b>	Charter petitions may be submitted at ANY regularly scheduled board meeting. It is <b>STRONGLY RECOMMENDED</b> that petitions seeking to open in the subsequent academic school year be submitted prior to November 15 of the academic year prior in order to ensure sufficient time to prepare for opening following approval. Petition submissions are recommended to occur between August and March. NOTE: The OUSD Board of Education is in recess throughout the month of July.
<b>Format</b>	Please ensure all required areas are addressed, include attachments sparingly but as needed to ensure evidence of a reasonably comprehensive program description, avoid complex binding, and provide <b>10 copies</b> of the petition submission in its entirety and <b>one CD-RW</b> containing soft-copies in Microsoft Word and Excel (budgets) format of all materials included in the original submission, plus a PDF that is an exact copy of the paper petition. Petition signatures must include a phone contact for verification purposes.
<b>Forms</b>	Letter of Intent, certification statement, statement of assurances, charter school roster of key contacts, operating budget template, signatures with phone contacts.
<b>Where to Mail or Email <u>Letters of Intent</u></b>	Office of Charter Schools Educational Center at Tilden 4551 Steele Street, Room 9 Oakland, CA 94619 P: (510) 336-7572 Email: Kamala.Puligandla@ousd.k12.ca.us
<b>Where to submit <u>Charter Petition</u></b>	Regularly Scheduled Governing Board Meeting <b>MUST BE SUBMITTED DURING PUBLIC COMMENT USING A SPEAKER CARD</b> LaEscuelita Education Center, 1050 2 <sup>nd</sup> Avenue
<b>Letter of Intent (template attached)</b>	All interested charter school petitioners are asked to notify the Office of Charter Schools of their intention to apply for a charter by completing the Letter of Intent.
<b>Submission of Petition</b>	Initial submission of the charter petition to the Oakland Unified School District Governing Board must occur during a regularly scheduled board meeting. This is done during the Public Comment section of the meeting. Petitioner should submit a “speaker card” and when called to the podium; simply state name, affiliation, and intent to submit charter petition for consideration. Submit petition and all required copies at that time to the Board Secretary for handling.

<b>Acknowledgement of Receipt</b>	Charter Petitions will be date stamped at the time of submission. A letter or email will be provided to the lead petitioner verifying receipt of a full petition with information regarding important dates associated with the petition review process and timeline within five to ten days.
<b>Public Hearing</b>	<p>As provided by the Charter Schools Act, a public hearing will be held by the Board of Education to allow the petitioners to speak on behalf of their charter petition, as well as allow for public comment on the proposed charter within 30 days of the submission of the charter petition.</p> <p>The purpose of the hearing will be for clarification by the BOE regarding the specifics of the proposed charter, as well as an opportunity for the BOE and Office of Charter Schools staff to better understand the public sentiment surrounding the proposed charter. Questions and comments generated here may likely serve as the basis for questions to be posted during the petitioner interview. Petitioners must submit all presentation documents including PowerPoint presentations intended for use at the Public Hearing, to the Board Secretary <a href="mailto:Edgar.Rakestraw@ousd.k12.ca.us">Edgar.Rakestraw@ousd.k12.ca.us</a> no later than 12pm on the Wednesday prior to the Public Hearing date.</p>
<b>Formal Review of Petition Overview</b>	The Formal Petition Review includes the two remaining parts of the review process. Each part is intended to allow for the application of guiding principles that we believe will assist in ensuring the recommended approval of only high quality charter petitions and subsequently high quality schools. The foundation of this process is the interest in establishing a sound educational program and petitioner capacity to successfully implement their proposed charter. ( <i>Education Code</i> §47605(b)(1)(2))
<b>Part I: Evaluation Rubric</b>	District staff will thoroughly read the charter petition and all supplemental materials. A review team will be convened, if necessary, with expertise focused on key areas of the petition. A rubric developed in collaboration with the <i>National Association of Charter School Authorizers (NACSA)</i> , local charter school leaders, and in accordance with the Charter Schools Act of 1992 and its applicable laws and regulations, will be applied to the charter petition. The combined analysis of this review process will contribute to the overall evaluation of the charter petition. During the review process, questions will be generated in an effort to better clarify the soundness of the educational program, as well as the capacity of the lead petitioners to successfully implement the proposed charter. These questions may be posed during the Petitioner Interview/s.
<b>Part II: Petitioner Interview/s</b>	<p>Petitioner interview/s will be conducted by the Office of Charter Schools. This will be scheduled within a sufficient timeframe to allow for timely submission of a staff report to the BOE within the legal limits of the Charter Law. The interview/s will be facilitated by the Coordinator of the Office of Charter Schools and will be comprised primarily of Office of Charter Schools staff and may include additional members of a review team.</p> <p>The interview/s will require the participation of the lead petitioners, all identified school administrators, and the entire governing board, if possible. All participants</p>

	<p>will be subject to questions during the interview process.</p> <p>Questions during the interview/s will specifically seek to develop a clearer understanding of the will, skill, and capacity of the lead petitioners and their governing board to effectively and successfully implement their proposed charter school. Background into the design process, qualifications of the proposed school leadership and key staff, design elements, and existing, as well as developing, structures, systems and curriculum will be inquired upon to assist in informing the petition review process.</p>
<b>Office of Charter Schools Staff Recommendation</b>	<p>The staff of the Office of Charter Schools will make a formal recommendation based on the outcome of the charter review evaluation process and the petitioner interview/s. This staff report and recommendation will be made to the BOE of the District with respect to approval or denial of the charter petition. Staff Reports become available two days prior to the Teaching and Learning Committee meeting at which the petition will be considered.</p> <p>During the BOE Teaching and Learning Committee meeting and the full BOE meeting for which the charter petition approval/denial is on the agenda, the lead petitioner and any other supporters of the charter school have the right to speak on behalf of their petition request regardless of the nature of the staff recommendation.</p> <p>An appeal of the decision by the BOE is permitted pursuant to applicable laws, should a charter petition be denied.</p>
<b>Board of Education Decision</b>	<p>The Board of Education votes to approve or deny the charter petition.</p>

Form must be completed and returned to the Office of Charter Schools no more than **5 calendar days** following the introductory meeting. Scan and email to [kamala.puligandla@ousd.k12.ca.us](mailto:kamala.puligandla@ousd.k12.ca.us) or hand-deliver.

Charter School Name: \_\_\_\_\_

**Attendees at Petitioner Interview:**

FOR OFFICE USE ONLY

Date Received:


Signature:

Date Received:  
Signature:

Signature:


Name


[illegible]

governing board member


 Home Office Leadership


Title: \_\_\_\_\_

governing board member


 Home Office Leadership


Title: \_\_\_\_\_

governing board member

 Home Office Leadership


Title: \_\_\_\_\_

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PETITIONER INTERVIEW FOUNDING GROUP INFORMATION FORM

Form must be completed and returned to the Office of Charter Schools no more than **5 calendar days** following the introductory meeting. Scan and email to [kamala.puligandla@ousd.k12.ca.us](mailto:kamala.puligandla@ousd.k12.ca.us) or hand-deliver.

**Charter School Name:** \_\_\_\_\_

**Attendees at Petitioner Interview:**

FOR OFFICE USE ONLY

Date Received:

Signature:

Name

Role (check one)

\_\_\_\_\_

☐ school administrator  
☐ Founding Group member

\_\_\_\_\_

☐ school administrator  
☐ Founding Group member

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☐ school administrator  
☐ Founding Group member



## OUSD DUE DILIGENCE QUESTIONNAIRE INSTRUCTIONS

Please distribute an electronic version of the Due Diligence Questionnaire to each proposed governing board member and proposed site administrator. Individuals must complete the form electronically, print it out, sign and return it to the lead petitioner. The lead petitioner should then submit the questionnaires, with original signatures, to the Office of Charter Schools no later than 10 calendar days following the introductory meeting. If you have any questions, please contact Kamala Puligandla at the Office of Charter Schools at (510) 336-7572.

# Oakland Unified School District Due Diligence Questionnaire

## Charter Petition Applicant Information

Name of Applicant (First/Middle/Last):

Other Names Used (i.e. Maiden):

Date of Birth:

Current address:

City:

State:

ZIP:

How long at current address?

Prior Addresses (Past five years):

## Background Information (Please Attach Separate Sheets if Necessary)

Criminal History (Date(s) of Arrest(s) or detentions leading to conviction/ Date(s) of Conviction(s)):

Education History:

Employment History:

All Professional Licenses / Credentials Held:

Professional Affiliations (Corporate Positions, Board Positions, etc.):

Fictitious Business Name Affiliations:

Professional References:

## Proposed Charter School

Charter School name:

Address (if available):

City:

State:

ZIP:

Legal Entity Behind Charter School (if available):

Other Charter Schools with which Affiliated (prior and current):

Location of Other Charter Schools:

## Authorization to Release Information

My signature affirms that all information on this application is true to the best of my knowledge. Further, I authorize all employers, institutions, government agencies and persons named as references to release information for use in establishing my qualifications and credentials for this position. This authorization:

- Removes all liability from those who provide information and verification in response to any information I have stated in applying on behalf of the above referenced Charter School.
- Releases the Oakland Unified School District and any agent acting on its behalf from any and all liability of whatever nature in requesting or using such information to assess my candidacy on behalf of the above referenced Charter School.
- Is valid during my entire candidacy and during any resulting period of employment or governing board membership with the above-referenced Charter School.
- Is an indication of my knowledge and understanding that the information provided in this application will be used to investigate my background and my knowing and voluntary agreement to the background information being publicly disclosed as part of the charter petition review process.
- Is an indication of my understanding that any reports generated by the Office of Charter Schools will not be confidential and my knowing and voluntary waiver of any such confidentiality.

## Signature

Date:

Title:

## FOR OFFICE USE ONLY

Charter School Application Processed by:

Phone:

Fax:

E-mail:

\* Form will be transmitted electronically via email to the contact information of the lead petitioner provided in the submission of the original charter petition following the introductory meeting.

**\* Forms MUST BE submitted for each proposed governing board member and proposed site administrator within 10 calendar days of introductory meeting TYPED with ORIGINAL SIGNATURES.**

## CHARTER SCHOOL ROSTER OF KEY CONTACTS

Complete the following Roster for the Board of Directors and key administrative leaders and/or partners for the proposed school. Be sure to include titles and roles.

FOR OFFICE USE ONLY

Date Received:

Signature:

**Name of School:**

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**Name of Nonprofit Corporation:**

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**Lead Petitioner:**

---

**Mailing Address:**

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**Phone (day & evening):**

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**Fax & Email:**

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### NONPROFIT BOARD OF DIRECTORS

Position:

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Name:

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Mailing Address:

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Phone (day & evening):

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Fax & Email:

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Position:

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Name:

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Mailing Address:

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Fax & Email: \_\_\_\_\_

Position: \_\_\_\_\_

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone (day & evening): \_\_\_\_\_

Fax & Email: \_\_\_\_\_

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**SCHOOL PERSONNEL**

**Principal Name:** \_\_\_\_\_

Phone (day & evening): \_\_\_\_\_

Fax & Email: \_\_\_\_\_

**Business Manager:** \_\_\_\_\_

Phone (day & evening): \_\_\_\_\_

Fax & Email: \_\_\_\_\_

**Certified Public Accountant:** \_\_\_\_\_

Phone (day & evening): \_\_\_\_\_

Fax & Email: \_\_\_\_\_

**OTHER AS APPLICABLE (school management entity, partner)**

Contact Person: \_\_\_\_\_

Title/Position: \_\_\_\_\_










Organization: \_\_\_\_\_

Phone (day & evening): \_\_\_\_\_

## CONDITIONS ON OPENING:

The vast majority of these items are intended to be “one time” submissions for new schools. Only those items marked with an asterisk (\*) are intended to be updated annually. **Please pay careful attention to the due date for all conditions on opening.** All items listed are to either be emailed on or before the due date to [silke.bradford@ousd.k12.ca.us](mailto:silke.bradford@ousd.k12.ca.us) and cc'd to [kamala.puligandla@ousd.k12.ca.us](mailto:kamala.puligandla@ousd.k12.ca.us) or hand-delivered to the OUSD Office of Charter Schools at 4551 Steele Street, Room 9, Oakland, CA 94619. *Hand-delivered items must receive a receipt from the Office of Charter Schools to ensure verification of timely submission.*

Charter Revision		
Wednesday April 15, 2015		Submit to the District’s Office of Charter Schools one hard copy and one electronic copy in <i>MS Word</i> format of a <b>Track Changes</b> version of the revised charter, as well as a <b>Final Text</b> version of the revised petition to include all revisions outlined in the charter approval. In addition, insert the page number references outlined in the “Required Text Revisions” one page document that the Office of Charter Schools will email to you after approval.
Enrollment Policies and Application for Admission		
Monday, July 13, 2015		Submit list of enrolled students—including name, DOB, prior school, home language, Oakland residency or not, and CSIS number (list to be updated fall 2013 and annually) using Excel template provided by the Office of Charter Schools.*
Complaint Procedures		
Monday, August 3, 2015		Submit current Board-approved Uniform Complaint Process, posting location(s), and method of notifying parents of this annually.
Student Learning Time		
Monday, August 3, 2015		Submit certification of instructional minutes to be provided in 2012-2013.* Carefully read <i>Education Code §46201(a)(3)</i> . [instructional minutes requirement]
		Submit updated, adopted 12-month school calendar distinguishing dates with standard or reduced instructional time, and noting vacation days.*
Code of Conduct, Student Handbook, and Recommended Policies		
Monday, August 3, 2015		Submit Student and Family Handbook.* (Prepare student/family handbook and registration materials--to include the enrollment schedule, school calendar, all policies and procedures pertaining to health and safety, homework, attendance, discipline, suspension and expulsions, parent complaint procedures--in all languages as distributed.) In addition, the handbooks need to have the English Learner reclassification policy clearly outlined with specific thresholds of performance in the criteria (i.e. scoring a 4 or 5 on CELDT, receiving a particular letter grade in ELA etc.)
Insurance Policies		
Monday, July 13, 2015		Submit evidence of commercial general liability insurance for not less than \$1,000,000 per incident; to include the District as additionally insured.
		Submit evidence of fidelity bond coverage for not less than \$50,000 per occurrence and workers’ compensation insurance.
Financial Organization		
Friday, May 29, 2015		Submit copy of the school’s Annual Information Sheet & Funding Survey” to the CDE (plus annual filings to be provided to CDE by June 1 and any updates in future years).
School Facility and Building Safety		
Monday, August 3, 2015		Make available for inspection a current Fire Inspection Certificate.
		Submit Board-approved Drug, Alcohol, and Smoke Free Environment Policies and Procedures.
		Submit current Facilities Safety and Evacuation Plan.

Special Education Program Plan		
Wednesday, July 1, 2015		Submit proof of membership in El Dorado County SELPA.
		Submit adopted 504 plan, policy, and procedures.
		Submit Special Education Identification and Assessment Plan.
Budget and Cash Flow		
Monday, August 3, 2015		Submit 2 paper copies, in addition to an electronic version of an updated and revised cash flow statement and 3-year projections.
School Health Plan and Medications Administration Plan		
Monday, August 3, 2015		Submit updated School Health Plan (to comply with immunization audit, hearing and vision screening requirements) and Medications Administration Plan.
Instructional Staff		
Monday, August 3, 2015		Submit a list of teachers hired, including name, DOB, assignments, subject matter certification and credential evidence, qualification to teach ELL students, evidence of current clear tuberculosis test, date of fingerprinting, and date of background review.*
		Submit current employee handbook, including policies and procedures that ensure the health and safety of students and staff.
		Submit list of teachers requiring Beginning Teacher Support and Assessment.
Programming Plans		
Monday, August 3, 2015		Submit English Learner Plan: adopted policies and procedures that pertain to use of a home language survey and mandatory CELDT testing.