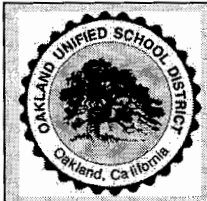


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OAKLAND UNIFIED SCHOOL DISTRICT
Office of the Superintendent
1025 Second Avenue, Room 301
Oakland, CA 94606
Phone (510) 879-8200
Fax (510) 879-8800

TO: Board of Education
FROM: Anthony Smith, Ph.D., Superintendent
Gail Greely, Coordinator, Office of Charter Schools
DATE: August 10, 2011
RE: Urban Montessori Charter School
Charter Petition Request

WENT GOVT. S.

Legislative File
File ID No.: 11-1363
Introduction Date: 5/25/11
Enactment No.: _____
Enactment Date: _____
By: _____

ACTION REQUESTED

Approve the petition and charter to establish Urban Montessori Charter School. The petition presents a sound educational program; the petitioners are demonstrably likely to successfully implement the program set forth in the petition; the petition contains the required signatures and affirmations; and the petition contains reasonably comprehensive descriptions of all of the 16 elements required by the California Charter Schools Act.

SUMMARY

Staff recommends that the OUSD Board of Education approve the petition for Urban Montessori Charter School to serve students in grades K-8, to begin operation July 1, 2012 under the California Charter Schools Act. Staff recommends approval based on due diligence conducted to ensure that the establishment of the charter is consistent with sound educational practices.

PROCEDURAL BACKGROUND

- 1) The lead petitioner submitted a petition for the Urban Montessori Charter School on Ma7 25, 2011 at a regularly scheduled Board of Education meeting.
- 2) Staff held an introductory meeting with the lead petitioners, Peter Laub and Hae-Sin Thomas on June 3, 2011 to explain the petition review process and obtain petitioning group contact information.
- 3) Staff conducted two Petitioner Interviews on June 9, 2011, with participants from two groups: the school design team (including parents of prospective students) and the governing board/petitioning group.
- 4) A public hearing was held on June 22, 2011. Representatives from the lead petitioning group, including parents of prospective students, presented.

STATUTORY BACKGROUND

Pursuant to Education Code §47605:

Charter law outlines the criteria governing the approval or denial of charter school petitions. The following excerpt is taken from the Charter Schools Act, Education Code §47605. This excerpt delineates charter approval and denial criteria:

A school district governing board shall grant a charter for the operation of a school under this part if it is satisfied that granting the charter is consistent with sound educational practice. The governing board of the school district shall not deny a petition for the establishment of a charter school unless it makes written factual findings, specific to the particular petition, setting forth specific facts to support one or more of the following findings:

- (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.*
- (3) The petition does not contain the number of signatures required.*
- (4) The petition does not contain an affirmation of each of the conditions described in Education Code §47605(d).*
- (5) The petition does not contain reasonably comprehensive descriptions of the 16 required charter elements.*

DISCUSSION

Staff convened a petition review team comprised of leadership within the District, which subsequently conducted an evaluation of the petition pursuant to the Charter Schools Act and with the application of the Oakland Unified School District Petition Evaluation Rubric.

During the petition review process, staff conducted two Petitioner Interviews in an attempt to clarify various aspects of the petition, as well as to evaluate the capacity of the petitioners to successfully implement the program as set forth in the petition.

Urban Montessori Charter School proposes to open in fall 2012 as a direct-funded charter school, operating in Region 2. The school proposes to serve 252 students in grades K-2 in its first year (2012-13), growing to a full capacity of 681 K-8 students in its 7th year of operation. (In its 5th year of operation, the end of the initial charter term, the school projects that it will be serving 540 students in grades K-6.)

Urban Montessori Charter School proposes to operate an urban public school based on the pedagogy, curriculum and philosophy of Dr. Maria Montessori. As described in the charter petition, the Montessori method will be supplemented with interdisciplinary design challenges and arts integration.

The staff report and charter petition evaluation contained herein describe the educational program, proposed school operations, as well as an articulation of strengths and foreseeable challenges, pursuant to the petition review process.

RECOMMENDATION

Staff recommends that the Oakland Unified School District's Board of Education **approve** the petition for Urban Montessori Charter School under the California Charter Schools Act. The factual findings illustrated in this report demonstrate that the petition satisfies the five legally required categories of *Education Code § 47605*:

- (1) The charter school presents a sound educational program for the pupils to be enrolled in the charter school;*
- (2) The petitioners are demonstrably likely to successfully implement the program set forth in petition*
- (3) The petition contains the number of signatures required;*
- (4) The petition contains an affirmation of each of the conditions described in Education Code §47605(d);*
- (5) The petition contains reasonably comprehensive descriptions of the 16 required charter elements.*

This approval is for the charter program and operation in its entirety as proposed and revised herein to include all terms and conditions set forth in this report. Any subsequent material revision of the provision of this charter may be made only with the approval of the District as charter authorizer (*Education Code §47607(a) (1)*). Any material revision to any charter component must be proposed and considered according to the standards and criteria in Education Code §47605 (*Education Code §47607(a) (2)*).

The term of this charter will be from July 1, 2012 through June 30, 2017, the maximum period allowed under the California Charter Schools Act (*Education Code §47607(a)(1)*). The District will not accept a charter renewal request more than 270 days prior to the expiration of the charter.

A charter may be revoked by the authority that granted the charter if the authority finds that the charter school committed a material violation of any of the conditions, standards, or procedures set forth in its charter (*Education Code §47607(c)(1)*). The Board of Education's approval of this charter shall incorporate the conditions on opening and associated deadlines as a condition of the charter.

The District retains the authority to delay opening for a period of up to one year, if any of the conditions on opening are not satisfactorily met by the associated deadlines. Not meeting any one of the conditions on opening and associated deadlines set forth in this approval may be grounds for revocation as set forth in the California Charter Schools Act (*Education Code §47607(c)(1)*).

Pursuant to OUSD Governing Board Policy, BP 0420.4, if the school does not open on or before September 30, 2013, it will be considered a demonstration of petitioners' lack of capacity to implement the program set forth in the petition and the District will initiate charter revocation procedures.

ATTACHMENT 1 – CHARTER PETITION EVALUATION

Oakland Unified School District Charter Petition Evaluation

School Name: Urban Montessori Charter School	Submission Date: May 25, 2011
Lead Petitioners: Hae-Sin Thomas and Peter Laub	Public Hearing Date: June, 22, 2011
Governing Board/Petitioner Team: Randy Weiner, Susan Wise, Amanda Klein, and Erin Hennigan	Petitioner Interview Date: June 3, 2011
Design Team: Mara Benitez, Thomas, Tana Johnson, Rebecca Reynolds, Lisa Troung, Pam Briskman, Bernadette Chi, Junko Green, Sibyl Buckner, and Nadia Kachwaha Comiso	Petitioner Interview Date: June 9, 2011
	Governing Board Interview Date: June 9, 2011
	Committee Presentation Date: August 1, 2011
	Decision Date: August 10, 2011

Recommendation:

Approval of the Urban Montessori Charter School charter petition to reflect the terms and conditions set forth in this report, to begin operation July 1, 2012, and to expire June 30, 2017. Staff recommends approval of a full five-year term of operation. If conditions set forth here-in are not met as of August 1, 2012, and/or the petitioner and the Board of Education of the Oakland Unified School District mutually agree that success of the program would benefit from a delayed opening, the charter term will reflect the actual operation of the school to allow for a full five-year term of operation.

Proposed location of school	Lake Merritt area in downtown Oakland (two sites under active consideration) (Pg. 103)
Composition of petitioner group	Founding team includes individuals with experience in education (including Montessori), charter school management, non-profit management, teacher education, and facilities. Some of the members are parents of prospective students at the school. (App. B)
Grade levels to be served in year 1	K-2
Anticipated enrollment in year 1	252
Grade levels to be served at full-capacity	K-8

Anticipated enrollment at full capacity	681
Target student population	<p>“Urban Montessori aims to enroll children whose diversity is representative of Oakland’s population. According to the 2010 US Census, the city is 27.3% Black or African American, 25.9% White (non-Hispanic), 16.7% Asian. Hispanics or Latinos (or any race) make up 25.4% of the total population. The data show that Oakland is one of the most ethnically diverse cities in the country. There have been numerous studies demonstrating that children who attend schools with children and families from different backgrounds, cultures, races, and religions, from alternative family structures, and who speak different languages are better prepared to successfully negotiate today’s increasingly global society academically, economically, and socially. Urban Montessori believes that diversity in a student population is an asset, one that powerfully and authentically engages children in productive discourse around what makes us different and what brings us together, and exposes them to the many perspectives, values, traditions, and ideas in our multicultural community.” Pg. 9</p>

Brief description of the kind of school to be chartered.

“Children who attend Urban Montessori will be well educated and be able to use their knowledge flexibly in novel contexts. They will have effective teachers, trained in Montessori methods, state standards, current research and best practices. Urban Montessori children will enjoy learning to think creatively and critically through all subject areas, including math, language arts, science, history/social studies, world language, physical education, music, arts and design. Children will have extended blocks of uninterrupted learning time that allow for concentration and practice. Moreover, they will collaborate with other children regularly on Design Challenges that make problem solving and creative thinking an integral part of the Urban Montessori experience.” (Pg. 4)

Brief explanation of the mission of proposed charter school.

“Urban Montessori Charter School develops self-directed and engaged learners who are academically, socially, and emotionally prepared to succeed in any high school. Nurturing the innovators of tomorrow to creatively meet the challenges of today’s world with confidence, compassion and grace. Urban Montessori cultivates individual curiosities and strengths, while holding children to a high standard of excellence. At Urban Montessori, children deepen their understanding of what it means to live responsibly in a diverse urban community.” (Pg. 8)

Planning to work with a charter management organization (CMO)

Yes ___ No ___ If Yes, Name of CMO:

Signature Verification:

EC 47605(a)(3) A petition shall include a **prominent statement that a signature on the petition means that the parent or guardian is meaningfully interested in having his or her child, or ward, attend the charter school, or in the case of a teacher's signature, means that the teacher is meaningfully interested in teaching at the charter school.**

The proposed charter shall be attached to the petition.

	Y	N	PG #
<input type="checkbox"/> Parents / Guardians			Tab 4
<input type="checkbox"/> # aligned with proposed opening enrollment	X		
<input type="checkbox"/> Prominent statement	X		
<input type="checkbox"/> Teachers			N/A
<input type="checkbox"/> # aligned with proposed opening enrollment			
<input type="checkbox"/> Prominent statement			

Oakland Unified School District

Charter Petition Evaluation

Criteria Reference

- **Inadequate:** The response lacks meaningful detail; demonstrates lack of preparation; or otherwise raises substantial concerns about the petitioner's understanding of the issue in concept and/or ability to meet the requirement in practice.
- **Approaches:** The response addresses most of the selection criteria, but lacks some meaningful detail and requires important additional information in order to be reasonably comprehensive.
- **Meets:** **The response indicates solid preparation and grasp of key issues that would be considered reasonably comprehensive. It contains many of the characteristics of a response that excels even though it may require additional specificity, support or elaboration in places.**
- **Excels:** The response reflects a thorough understanding of key issues and indicates capacity to open and operate a quality charter school. It addresses the topic with specific and accurate information that shows thorough preparation and presents a clear, realistic picture of how the school expects to operate.

STATEMENT OF ASSURANCES

ASSURANCES	Y	N	PG #
1. Will not charge tuition, fees, or other mandatory payments for attendance at the charter school or for participation in programs that are required for students.	X		Pgs. 2-3
2. Will enroll any eligible student who submits a timely and complete application, unless the school receives a greater number of applications than there are spaces for students, in which case a lottery will take place in accordance with California charter laws and regulations.	X		Pgs. 2-3
3. Will be non-secular in its curriculum, programs, admissions, policies, governance, employment practices, and all other operations.	X		Pgs. 2-3
4. Will be open to all students, on a space available basis, and shall not discriminate on the basis of race, color, national origin, creed, sex, ethnicity, sexual orientation, mental or physical disability, age, ancestry, athletic performance, special need, proficiency in the English language or a foreign language, or academic achievement.	X		Pgs. 2-3
5. Will not base admission on the student's or parent's/guardian's place of residence, except that a conversion school shall give admission preference to students who reside within the former attendance area of the public school.	X		Pgs. 2-3
6. Will offer at least the minimum amount of instructional time at each grade level as required by law.	X		Pgs. 2-3
7. Will provide to the Office of Charter Schools information regarding the proposed operation and potential effects of the school, including, but not limited to, the facilities to be used by the school, including where the school intends to locate, the manner in which administrative services will be provided, and potential civil liability effects, if any, upon the school and authorizing board.	X		Pg. 107
8. Will adhere to all applicable provisions of federal law relating to students with disabilities, including the Individuals with Disabilities Education Act; section 504 of the Rehabilitation Act of 1974; and Title II of the Americans with Disabilities Act of 1990.	X		Pgs. 2-3
9. Will adhere to all applicable provisions of federal law relating to students who are English language learners, including Title VI of the Civil Rights Act of 1964; the Equal Educational Opportunities Act of 1974; MGL c. 76, § 5; and MGL c. 89, 71 § (f) and (l).	X		Pgs. 2-3
10. Will comply with all other applicable federal and state laws and regulations.	X		Pgs. 2-3
11. Will submit an annual report and annual independent audits to the OUSD Office of Charter Schools by all required deadlines.	X		Pg. 104
12. Will submit required enrollment data each March to the OUSD Office of Charter Schools by the required deadline.	X		Pg. 102
13. Will operate in compliance with generally accepted government accounting principles.	X		Pg. 104
14. Will maintain separate accountings of all funds received and disbursed by the school.	X		Pg. 104
15. Will participate in the California State Teachers' Retirement System as applicable.	X		Pg. 94

16. Will obtain and keep current all necessary permits, licenses, and certifications related to fire, health and safety within the building(s) and on school property.	X	Pg. 96 of
17. Will at all times maintain all necessary and appropriate insurance coverage.	X	Pg. 102
18. Will submit to the OUSD Office of Charter Schools the names, mailing addresses, and employment and educational histories of proposed new members of the Governing Board prior to their service.	X	
19. Will, in the event the Governing Board intends to procure substantially all educational services for the charter school through a contract with another person or entity, provide for approval of such contract by the Board of Education in advance of the beginning of the contract period.	X	
20. Will provide financial statements that include a proposed first-year operational budget with start-up costs and anticipated revenues and expenditures necessary to operate the school, including special education; and cash-flow and financial projections for the first three years of operation.	X	Pgs. 102, 107
21. Will provide to the Office of Charter Schools a school code of conduct, Governing Board bylaws, an enrollment policy, and an approved certificate of building occupancy for each facility in use by the school, according to the schedule set by the Office of Charter Schools but in any event prior to the opening of the school.	X	To be included in Conditions on Opening

EVALUATION:

The Urban Montessori Charter School petition contains all legally mandated assurances.

I. EDUCATIONAL PROGRAM

Statutory References:

E.C. § 47605(b) (1)

E.C. § 47605(b) (5) (A)-(C)

The education program should tell you who the school expects to serve; what the students will achieve; how they will achieve it; and how the school will evaluate performance. It should give you a clear picture of what a student who attends the school will experience in terms of educational climate, structure, materials, schedule, assessment and outcomes.

Petition Section/s
Pgs. 9 - 10

A. TARGET POPULATION

NOTE: Detail in this area is often lacking in charter petitions, but has been assessed by OUSD in its experience creating new schools to be a critical factor in the success of proposed educational programs.

A description of the Target Population excels if it has the following characteristics:

- Coherent description of the students the school expects to serve based on understanding of the district population and the location in which the school expects to operate;
- Demonstrated understanding of the educational needs of the target population; and
- Explanation of how the mission and vision align with the needs of the target population.

TARGET POPULATION

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: TARGET POPULATION

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<ul style="list-style-type: none"> - Designed to serve population of students that reflect Oakland’s population, not just OUSD student population. - Sees diversity as an asset for enhancing learning of all students. - Links individualized Montessori approach to better serving a wide variety of students: special education, gifted, English learners, children who are academically behind, children with widely varying backgrounds and learning styles. - Outreach efforts (completed and planned) and distribution of families signing petition substantiate commitment to diverse population. 	<p>Pg. 9</p> <p>Pg. 9</p> <p>Pg. 9</p> <p>App. C and Tab 4</p>		

B. PHILOSOPHY AND APPROACH TO INSTRUCTION

A description of the Educational Philosophy and Approach to Instruction excels if it has the following characteristics:

Petition Section/s
Pg. 10 -21

1. Rationale: *Is the rationale compelling?*

- A compelling rationale with a clear foundation in research-based educational practices, teaching methods and/or high standards for student learning;

2. Mission Alignment: *Do the philosophy and approach align with the mission and vision?*

- Alignment with mission and vision; and

3. Population Alignment: *Does sound reasoning or evidence indicate that the target population is likely to benefit?*

- Persuasive explanation of why the philosophy and approach are appropriate for and likely to result in improved educational performance for the target population, including any available performance data from use of the same educational philosophy and approach to instruction with similar populations.

1. Rationale: *Is the rationale compelling?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Mission Alignment: *Do the philosophy and approach align with the mission and vision?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

3. Population Alignment: *Does sound reasoning or evidence indicate that the target population is likely to benefit?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: EDUCATIONAL PHILOSOPHY AND APPROACH TO INSTRUCTION

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<p>Rationale</p> <ul style="list-style-type: none"> - Compelling statement of what it means to be an education person in the 21st century, with academic learning linked to emotional intelligence and creative confidence. - Rationale for Montessori approach tied to how learning best occurs: using a spiral curriculum in a multi-age classroom provides multiple points of entry and encourages individual curiosities. - Design challenges and arts integration used to ensure all children have ways to access content. Design thinking and arts integration There is evidence of success with the Aspire K-5 model in similar areas/neighborhoods. <p>Mission Alignment</p> <ul style="list-style-type: none"> - Philosophy is aligned to the stated mission given the emphasis on self-direction and mission to develop students academically, socially and emotionally. <p>Population Alignment</p> <ul style="list-style-type: none"> - Petition links the Montessori approach to diverse student population across multiple dimensions: culture, language, socio-economic status, learning styles, gifted students, special needs and family structure. 	<p>Pg. 10</p> <p>Pg. 11</p> <p>Pg. 11</p> <p>Pgs. 8, 10-11</p> <p>Pgs. 8, 11</p>	<p>Rationale</p> <p>Mission Alignment</p> <p>Population Alignment</p> <ul style="list-style-type: none"> - Target population is not defined by any neighborhood or particular student characteristics, but by families interested in the Montessori approach. 	<p>Pg. 8</p>

C. CURRICULUM FRAMEWORK **X** *Mark this box on behalf of the curriculum that has already been selected/developed:*

Petition Section/s
Pg. 12-84, Apps. A-1 through
A-16, A-20 through A-23

The description of the curriculum should provide the reviewer with a sense not only of *what* the school will teach but also of *how* and *why*. It must present research, applicant experience and/or reasoning sufficient to convince the reviewer that the applicants have already made sound educational decisions.

A description of the Curriculum Framework excels if it has the following characteristics:

1. **Alignment:** *Is the selection well-reasoned and aligned with the mission, state standards and student needs?*
 - o A clear description of the framework and research, experience and/or sound reasoning that demonstrates alignment with the school's mission, state standards and anticipated student needs;
2. **Implementation:** *Does the plan demonstrate the resources, scheduling and professional support needed for effective implementation?*
 - o An implementation plan showing persuasively the resources, daily schedule, annual calendar and professional development that support effective implementation; and
 - o A clear description of the manner in which the school will prioritize the implementation of those elements of the proposed educational program that will ensure likely achievement of the goals of the program;
3. **Evaluation:** *Does the school have strategies to evaluate effectiveness and respond when student performance falls short of goals?*
 - o Effective strategies for evaluating the effectiveness of implementation and responding when student performance falls short of goals.

1. **Alignment:** *Is the selection well-reasoned and aligned with the mission, state standards and student needs?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

2. **Implementation:** *Does the plan demonstrate the resources, scheduling and professional support needed for effective implementation?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

3. **Evaluation:** *Does the school have strategies to evaluate effectiveness and respond when student performance falls short of goals?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

ANALYSIS: CURRICULUM FRAMEWORK

YSIS, 2011

If Meets or Exceeds; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<p>Alignment</p> <ul style="list-style-type: none"> - Curriculum framework is clearly presented, with an explanation of the developmental basis (planes of development, sensitivities and prepared environment). - Explains the role of individual choices and interests of the child. - Clear, intentional alignment with California Standards, Common Core and state assessments within the Montessori Five Great Lessons. - Interdisciplinary design challenges at all ages are explained and connected to Montessori approach. <p>Implementation</p> <ul style="list-style-type: none"> - Teachers are highly trained in Montessori through relationship of program with St. Mary's. - Program treats language diversity as a strength. - Includes intentional teaching of grammar and language conventions. - Appendices include materials demonstrating thoughtful planning and preparation for implementation of the program, including: list of materials, sample schedules, calendar, sample design challenge unit, description of core instructional block, sample elementary and secondary work plans, standards maps for ELA and math (grades K through 6), instructional planning frameworks, sample lesson plan, professional development plan, and a 3-year opening plan reflecting priorities for program development. <p>Evaluation</p> <ul style="list-style-type: none"> - Petition includes multiple ways to assess student mastery. - Describes strong structures and practices for early intervention and for maximum inclusion of special education students 	<p>Pgs. 12-60</p> <p>Pgs. 17-18</p> <p>Pg. 16, Apps. A-10 and A-11</p> <p>Pgs. 18-19</p> <p>Pg. 11, App. D</p> <p>Pgs. 69-70</p> <p>Pg. 42</p> <p>Apps. A-4 through A-16, A-23, I</p> <p>Pgs. 75-84</p> <p>Pgs. 65-66</p>	<p>Alignment</p> <p>Implementation</p> <ul style="list-style-type: none"> - Petition does not address how "standard English" may be addressed in relation to African-American students. <p>Evaluation</p> <ul style="list-style-type: none"> - Not clear how the spiraling curriculum and multi-age grouping will impact the administration of state-mandated tests (i.e., Algebra 1 	<p>Pgs. 27, 52</p> <p>Pg. 55, Interviews</p>

<p>without stigma.</p> <ul style="list-style-type: none"> - Petitions describes strong diagnostics and formative assessments, with clear measurable student outcomes. - Assessment matrix is comprehensive, with outcomes identified across a wide variety of subject areas aligned to the school's mission. Assessment tools are specifically identified. - Criterion-referenced and formative assessments are described, and an assessment calendar is included. 	<p>Pg. 76</p> <p>Pgs. 77-79</p> <p>Pgs. 80-81, Apps. A-21 and A-22</p>	<p>CST for 8th grade). Addressed in interviews.</p>	<p>SLB</p>
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D. SPECIAL POPULATIONS: SPECIAL EDUCATION

Federal law requires charter schools, like all public schools, to provide a free appropriate education in the least restrictive environment to students identified with disabilities who are enrolled at the school. A plan for serving students with disabilities excels if it has the following characteristics:

- Demonstrated understanding of state and federal special education requirements including the fundamental obligation to provide a free, appropriate education to students identified with disabilities and obligations held under Section 504 of the ADA;
- A clear statement regarding what petitioners expect will be the school's anticipated LEA status for purposes of special education and the implications of that status determination;
- A sound plan -- including lead contact, funding, service and intervention arrangements -- for identifying and meeting the needs of students identified with disabilities;
- Alignment of the special education plan with the core educational program; and
- Evidence of high expectations for students with special needs.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: SPECIAL EDUCATION

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<ul style="list-style-type: none"> - Letter from El Dorado County Office of Education Charter SELPA confirms recommendation of acceptance of Urban Montessori as LEA within the SELPA. - Montessori design supports inclusion of special education students through individualized approach in multi-age classrooms. - Professional development on special education to be sought in partnership with Aspire Public Schools. - Appendix describes use of Response to Intervention and Student Study Teams. - Budget includes staffing for full time special education position and contracted services, consistent with experience of other EDCOE Charter SELPA members. 	<p>App. G</p> <p>Pgs. 12-14, 69</p> <p>Pg. 69</p> <p>App. A-17</p> <p>App. T</p>	<ul style="list-style-type: none"> - Expulsion/suspension policy draft does not include reference to requirements for students with IEPs, although petitioners are aware of legal obligations in this regard. 	<p>App. Q, Interview</p>

E. SPECIAL POPULATIONS: ENGLISH LANGUAGE LEARNERS

Federal law requires charter schools, like all public schools, to meet the needs of English language learners by helping them gain English proficiency and also make progress in all academic subjects. A plan for serving English language learners excels if it has the following characteristics:

- Demonstrated understanding of the likely English language learner population;
- A sound approach to identifying and meeting the needs of English language learners tailored to the anticipated population;
- A sound approach to helping English language learners fulfill expectations of the core educational program, including a lead contact and intervention process; and
- Evidence of high expectations for English language learners.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: ENGLISH LANGUAGE LEARNERS

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
<ul style="list-style-type: none"> - Petition describes language support for lower ELD levels where possible. - School proposes to adopt Dutro and Moran framework for ELL instruction. - Use of ADEPT assessment tool. - Identification, testing and reclassification procedures comply with legal requirements. 	<ul style="list-style-type: none"> Pg. 73 Pgs. 70-71, Apps. A-18 & 19 Pg. 74 Pgs. 69-70 	<ul style="list-style-type: none"> - Petition does not provide information on expected English learner population and home languages to be supported. - Unclear how home language will be fully maintained as an asset, as World Language program may not be fully implemented in early years. 	Interviews

F. PUPIL OUTCOMES

Pupil outcomes are central to the school's existence. They represent the school's definition of success and should drive all aspects of the program and operation. A description of Pupil Outcomes excels if it has the following characteristics:

- 1. Alignment:** *Do the objectives align with the mission and vision?*
 - Educational objectives aligned with the mission, vision and educational program;
- 2. Measurement:** *Are the goals clear, specific and measurable?*
 - Multiple performance measures applied to student learning objectives.
 - Measures include performance goals based on absolute (e.g., proficiency levels), relative (e.g., comparison schools) and individual gains (e.g., year-to-year matched student cohort gains);
 - Goals that are specific, measurable and timebound;
- 3. Performance Level:** *Have the petitioners demonstrated that the target performance levels are both ambitious and attainable?*
 - Performance levels that are both ambitious and realistic including rigorous promotion and graduation standards;
 - Performance levels are considered annually and graduated as needed to sufficiently accelerate learning based on the needs of the target population;

1. Alignment: *Do the objectives align with the mission and vision?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Measurement: *Are the goals clear, specific and measurable?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

3. Performance Level: *Have the petitioners demonstrated that the target performance levels are both ambitious and attainable?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

ANALYSIS: PUPIL OUTCOMES

145...

If Meets or Exceeds; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
<p>Alignment</p> <ul style="list-style-type: none"> - Well-aligned to Montessori vision of educated child, across all subject areas, including qualities beyond high academic standards. <p>Measurement</p> <ul style="list-style-type: none"> - Matrix of measurable outcomes and assessments is well-developed and aligned to the theory of action on assessments and the Montessori approach. - Frequent assessments included in comprehensive calendar. - Well-developed plan for use of data in cycles of inquiry. - Working with educational organizations to identify a comprehensive solution to integrate data from various assessments. Selection and implementation included in opening plan. <p>Performance Level</p> <ul style="list-style-type: none"> - Performance levels are ambitious, but based on an expected baseline of 50% proficient/advanced CST, but allows for appropriate adjustment of baseline. 	<p>Pgs. 75-79</p> <p>Pgs. 77-79</p> <p>App. A-22</p> <p>Pgs. 83-84</p> <p>Pg. 83, App. I</p> <p>Pg. 79 (footnotes)</p>	<p>Alignment</p> <p>Measurement</p> <p>Performance Level</p>	

G. PUPIL PROGRESS

Summative evaluations measure student performance for the purpose of evaluating academic program effectiveness and overall school operation. In other words, they are used to determine how much students have learned.

Formative evaluations measure student performance for the purpose of determining students' learning needs and to inform instructional strategies. In other words, they are used to determine what students still need to learn.

A plan for evaluating Pupil Progress excels if it uses both formative and summative and includes the following characteristics:

- 1. Assessments:** *Does the school have valid and reliable measures of student progress?*
 - Identification of the expected range of formative and summative assessments including but not limited to state-mandated assessments;
 - Evidence that assessments will be valid and reliable measures of student progress toward achieving the identified Pupil Outcomes.
- 2. Instruction Improvement:** *Does the school have a sound plan for using assessments to inform instruction?*
 - A coherent strategy for using student assessment and performance data to evaluate and inform instruction on an ongoing basis.
- 3. Reporting:** *Is the school committed to reporting and disseminating performance information?*
 - A plan for sharing performance information, including standardized test results, with students, families and public agencies, as required.
 - A clear description of the manner in which stakeholders will act upon and make use of the performance information provided.

1. Assessments: *Does the school have valid and reliable measures of student progress?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Instruction Improvement: *Does the school have a sound plan for using assessments to inform instruction?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Reporting: *Is the school committed to reporting and disseminating performance information?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: PUPIL PROGRESS

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<p>Assessments</p> <ul style="list-style-type: none"> - Range of diagnostic, formative and summative assessments. Appendices provide full description of assessments. <p>Instructional Improvement</p> <ul style="list-style-type: none"> - Clear vision for teacher cycles of inquiry that aligns with Montessori approach to child’s individual learning. Assessments align with learning plans and other Montessori instruments for tracking student activity and performance. <p>Reporting</p> <ul style="list-style-type: none"> - Petition calls for reporting of results to parents through various means, including access to computerized information, family meetings and family accountability sessions. - Reporting to the governing board and authorizer is also included. 	<p>Pgs. 77-79, 80-82, Apps. A-20 through A-22</p> <p>Pg. 83, Apps. A-9 and A-12</p> <p>Pg. 83-84</p> <p>Pg. 84</p>	<p>Assessments</p> <ul style="list-style-type: none"> - Large number and variety of assessments raising questions of reconciliation between Montessori approach and traditional assessments. <p>Instructional Improvement</p> <p>Reporting</p>	

EDUCATIONAL PROGRAM SUMMARY

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

EDUCATIONAL PROGRAM SUMMARY

Strengths

The petition is thorough and detailed in describing a comprehensive educational program based on the Montessori approach. It is designed to meet the needs of a diverse Oakland population. The program's vision of what it means to be an educated person in the 21st century is compelling, as it addresses the whole child, including cognitive, social, emotion and physical stages of development. The program design is appropriate for a wide range of students, including those with special needs, performing below grade level or learning English. The assessment plan is varied and uses appropriate measures tied to clearly-identified student outcomes. Extensive appendices provide supplemental information that supports the research basis for the program design.

Concerns and Additional Questions

Over-arching question is the challenge of merging the Montessori approach with state standards for content and the state accountability system. The program design also expects teachers to cover a wide range of content (particularly at the secondary level) and engage in substantial professional development before opening and throughout the academic year.

II. PETITIONER CAPACITY

Statutory References:

- E.C. § 47605(b) (2)
- E.C. § 47605(b) (5) (D)-(P)
- E.C. § 47605(c) (2)
- E.C. § 47605(g)

The Charter Schools Act requires the authorizer to determine whether the petitioners are “demonstrably unlikely to successfully implement the program.” Experience with new school development demonstrates that unless petitioners have sound plans and capacity for governance, management, employment and financial operation, they are unlikely to successfully implement the program. This section should provide a clear, convincing picture of the petitioners’ capacity to operate the school successfully.

A. GOVERNANCE CAPACITY

A description of the plan for Governance excels if it has the following characteristics:

Petition Section/s Pgs. 85-90, Apps. J and K
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1. Legal Structure: *Does the school have adequate and appropriate legal structure?*

- Documentation of proper legal structure (Articles of Incorporation stamped by the Office of the Secretary of State and corporate Bylaws);
- Evidence of 501(c)3 Non-Profit Corporation status;
- Adequate bylaws, policies & procedures for governing body operation (director selection & removal, decision making, powers and duties, expansion and transition plans)

2. Charter School Governance Experience/ Expertise: *Does the board demonstrate the capacity needed to govern effectively?*

- Evidence of analysis that proposed founding members of the governing body possess and will contribute the wide range of knowledge and skills needed to oversee a successful charter school;
- Evidence of the existing or emerging capacity of the proposed founding members of the governing board to work as an effective unit in the interest of the proposed charter school;

3. Operating Plan: *Does the school have an operating plan that complies with legal obligations and incorporates sound governance practices?*

- Demonstrated understanding of the board’s responsibility for the educational and fiscal integrity of the school and for fulfilling the terms of the charter;
- Clear, reasonable selection and removal procedures, term limits, meeting schedules, and powers and duties for members of the governing body;
- Demonstrated understanding and assurance of compliance with open meetings requirements;
- Reasonable conflict of interest policy;
- Adequate plan for insurance;

- A plan for meaningful involvement or input of parents and community members in the governance of the school;
- Clear, sensible delineation of roles and responsibilities of parent councils, advisory committees or other supporting groups; and
- Clear, sensible definition of governing body roles and responsibilities in relation to management.

1. Legal Structure: *Does the school have adequate and appropriate legal structure?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Governance Experience: *Does the board demonstrate the capacity needed to govern effectively?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X

3. Operating Plan: *Does the school have an operating plan that complies with legal obligations and incorporates sound governance practices?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: GOVERNANCE CAPACITY

If Meets or Excels; <i>Strengths</i>	Reference	If Approaches or Inadequate; <i>Concerns & Additional Questions</i>	Reference
<p>Legal Structure</p> <ul style="list-style-type: none"> - Petitioners have formed a non-profit corporation and provided Articles of Incorporation and appropriate bylaws. - Bylaws are adequate and include provision for turnover of founding board. <p>Charter School Governance Experience and Expertise</p> <ul style="list-style-type: none"> - Board members cover a wide range of experience in needed areas. Many have numerous years of relevant experience, including board membership and charter school consulting. - Organization also has an advisory committee and a design team with additional expertise. <p>Operating Plan</p> <ul style="list-style-type: none"> - Petition commits organization to Brown Act compliance. - Petition commits to compliance with Fair Political Practices Commission standards. - Family Advisory Council structure provides opportunities for involvement in governance. Plan to encourage participation through special meetings and committees also included. - Description of Board duties reflects sound governance practice. 	<p>Pg. 85-86</p> <p>App. K</p> <p>Pgs. 5-6, App. B, Interview</p> <p>App. B, Interview</p> <p>Pg. 86</p> <p>Pg. 86</p> <p>Pg. 88-89</p> <p>Pgs. 85-86</p>	<p>Legal Structure</p> <p>Charter School Governance Experience and Expertise</p> <p>Operating Plan</p> <ul style="list-style-type: none"> - Conflict of interest policy not included. Petitioners are aware of potential conflicts associated with potentially contracting for services from members of the board. 	<p>Interview</p>

B. MANAGEMENT CAPACITY

Petition Section/s
Pgs. 95-102,
Apps. C, I, N through R

A leadership plan excels if it has the following characteristics:

1. **Enrollment Procedures:** *Does the petition present reasonable enrollment procedures that comply with applicable law?*
 - A description of the means by which the school will seek to attain a racial and ethnic balance among its pupils that is reflective of the district including specific plans and strategies for student recruitment;
 - A clear and compelling student recruitment plan likely to attract projected enrollment, particularly in Year 1;
 - A specific plan for conducting a public random drawing or an assurance that such a drawing will be conducted subject to district approval in the event that the number of pupils who wish to attend the school exceed the capacity;
 - An assurance that the school will not impose admission requirements OR, if the school proposes to have requirements, a precise description of those requirements, a compelling statement regarding why they are essential to fulfillment of the school's mission, and a specific plan for the school will incorporate the requirements into any random drawings.
 - A clear description of the enrollment process to include any unique intake or application evaluation process to be used by the school designed to meet the needs of the target population outlined in the petition.
2. **Operating Procedures:** *Does the petition present sound operating procedures that comply with applicable law?*
 - The procedures that the school will follow to ensure the health and safety of pupils and staff;
 - A clearly articulated discipline policy with suspension and expulsion procedures that are fully explained consistent with the school's mission, educational philosophy and applicable law;
 - A statement regarding attendance alternatives for students residing in the district who choose not to attend the school;
 - A statement that the school intends to use the district's approved procedure for resolving disputes relating to provisions of the charter OR, in the alternative, a clear description of the procedures that the school proposes to use;
 - A description of the systems likely to be effective in addressing parent and community complaints; and
 - An assurance that the school will comply with the district's approved procedures for school closure in the event that the charter is relinquished, revoked or not renewed.
3. **Management Structure:** *How effective is the management structure likely to be?*
 - Clearly defined management roles and responsibilities for all positions within the administration of the school;
 - A clear plan for recruitment, selection, development and evaluation of staff including the school leader;

- Verifiable internal procedures and controls to ensure conformance with the approved budget;
- An approved and public organizational chart delineating board and management roles and lines of authority;
- Clear, sensible delineation of roles and responsibilities for implementing the school program including clearly defined roles for parent councils, advisory committees and other supporting groups;
- Management job descriptions identifying key roles, responsibilities and accountability;
- An allocation of time, financial resources and personnel that is sufficient for planning and start-up prior to the school's opening; and
- The manner in which administrative services are to be provided and any potential civil liability effects on the school or the district.

1. Enrollment Procedures: *Does the petition present reasonable enrollment procedures that comply with applicable law?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Operating Procedures: *Does the petition present sound operating procedures that comply with applicable law?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Management Structure: *How effective is the management structure likely to be?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: MANAGEMENT CAPACITY

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<p>Enrollment Procedures</p> <ul style="list-style-type: none"> - Extensive outreach done to date and plan in place for additional work. - Recruitment activities prior to submission of petition identified sufficient families from a range of Oakland neighborhoods meaningfully interested to fill available spaces. - Admission preference and lottery procedures well-developed and conforms to requirements for PCSGP grant holders. <p>Operating Procedures</p> <ul style="list-style-type: none"> - Appropriate health and safety components included. Comprehensive draft safety plan included in appendix. - Discipline plan and suspension and expulsion procedures are fully developed and integrated with interventions described in educational program. Discipline reflects life skills elements of school’s mission and philosophy. - Attendance alternatives statement is included. - Reasonable dispute resolution and parent/community complaint procedures are included. - School closure procedures are compliant with charter law. <p>Management Structure</p> <ul style="list-style-type: none"> - School site positions and qualifications described in text and appendix. - Members of petitioning team have prior experience with successful school start-up providing evidence of the petitioner’s capacity. Appendices show substantial work already completed with reasonable plan for completing work over first three years. Conditions included with the petition 	<p>Pgs. 97-98, App. C Interviews, Tab 4</p> <p>Pg. 100, Interviews</p> <p>Pgs. 95-96, App. N</p> <p>App. Q</p> <p>Pg. 98</p> <p>Pgs. 96-97</p> <p>Pg. 104</p> <p>Pgs. 86-88, 90-92, App. L</p> <p>Apps. L through S</p>	<p>Enrollment Procedures</p> <p>Operating Procedures</p> <p>Management Structure</p> <ul style="list-style-type: none"> - No organizational chart provided, although it has been developed per interview. - Fiscal policies and procedures not included in appendices. - Contractor for “back office” supports not identified. Given limited non-credentialed staffing, contract will need to cover a substantial range of tasks. 	<p>Interview</p> <p>Pgs. 102-103, Interview</p>

- Potential civil liability effects on the school or the district are stated and adequate insurance is to be provided.	Pg. 107		
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C. EMPLOYMENT CAPACITY

Petition Section/s
Pgs. 90-94, Apps.
L and M

An employment plan excels if it has the following characteristics:

1. Qualifications and Responsibilities: *How clear and sensible are required staff capacities and intended allocation of responsibilities?*

- Description of the qualifications for and responsibilities of key employees of the school, including the instructional leader and other key school administration positions.

2. Compensation Plan: *How sound is the staff compensation plan?*

- A compensation plan based on sound budget assumptions that reflects understanding of the prevailing market and supports the proposed educational program.

3. Policies and Assurances: *Does the petition contain the required assurances and a reasonable plan for policy development?*

- Adequate personnel policies or a sound plan articulated for timely development;
- An assurance that staff will meet applicable state and federal requirements for credentialing and "highly qualified" status;
- An adequate description of 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;
- A statement regarding employee rights of return, if any;
- A clear declaration of 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; and
- An assurance that staff will have criminal background and other required health and safety checks and manner in which these will be conducted.

1. Qualifications and Responsibilities: *How clear and sensible are required staff capacities and intended allocation of responsibilities?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Compensation Plan: *How sound is the staff compensation plan?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Policies and Assurances: *Does the petition contain the required assurances and a reasonable plan for policy development?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: EMPLOYMENT CAPACITY

If Meets or Exceeds; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<p>Qualifications and Responsibilities</p> <ul style="list-style-type: none"> - Qualifications of key employees are described, as well as recruitment and hiring process. <p>Compensation Plan</p> <ul style="list-style-type: none"> - Budget narrative reflects reasonable compensation assumptions, comparable to local districts. <p>Policies and Assurances</p> <ul style="list-style-type: none"> - Draft employee handbook reflects reasonable and appropriate personnel policies. - Assurances as to staff credential requirements are included. - State Teachers' Retirement System and Public Employees' Retirement System participation is specified. - Employee return rights correctly described, per OUSD contracts. - Exclusive public school employer statement included. - Criminal background and other required health and safety checks are described. 	<p>Pg. 90-94, Apps. L and M</p> <p>App. T</p> <p>App. M</p> <p>Pgs. 91-92</p> <p>Pg. 94</p> <p>Pg. 94</p> <p>Pg. 94</p> <p>Pg. 95</p>	<p>Qualifications and Responsibilities</p> <ul style="list-style-type: none"> - Staff evaluation process and expectations for key staff are not included in petition. <p>Compensation Plan</p> <p>Policies and Assurances</p>	

D. FINANCIAL CAPACITY

Petition Section/s
Pg. 102, Apps. S, T, U

The petition should present an understanding of how the charter operators intend to manage the school’s finances and maintain the organization’s financial viability. It should make a persuasive case for financial viability including sound revenue projections; expenditure requirements; and budgetary support for and alignment with the educational program.

A plan for financial capacity excels if it has the following characteristics:

- 1. Financial Operation:** *How would you rate the structures and practices related to financial operation?*
 - A balanced three-year budget accurately reflecting all budget assumptions;
 - A start-up year plan with reasonable assessment of and plan for costs;
 - A clear indication that the school has a sound plan for sustainability including funding for the core program that does not have ongoing reliance on “soft” money (e.g., donations, grants, etc.);
 - Clear evidence and track record of sustainability, in the event there is an enduring reliance on “soft” money (e.g., donations, grants, etc.);
 - An adequate reserve and contingency plan targeted to the minimum enrollment needed for solvency (especially for year 1);
 - A sound plan for financial management systems;
 - An audit assurance and/or plan with adequate budget allocation; and
 - A plan for dissolution of assets should the school close.

- 2. Revenues:** *How would you rate the accuracy and attainability of the revenue projections?*
 - A narrative explaining key revenue assumptions;
 - Realistic revenue projections showing all anticipated revenue sources -- including state, local, federal and private funds, and any fee-based programs and services;
 - Realistic cash flow projection; and
 - A fundraising plan including assumptions and report on current status.

- 3. Expenditures:** *How would you rate the expenditure plan in terms of sound assumptions and priorities consistent with effective operation of the school?*
 - Spending priorities that align with the school’s mission, educational program, management structure, professional development needs, and growth plan;
 - A budget narrative explaining key expense assumptions;
 - Realistic expense projections addressing major operating expenses including staffing and benefits, special education, facility, materials and equipment, and contracted services;
 - Budgeting to meet minimum insurance requirements; and
 - Evidence to support key assumptions including that compensation is sufficient to attract qualified staff and that facilities budget is adequate.

1. Financial Operation: *How would you rate the structures and practices related to financial operation?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

2. Revenues: *How would you rate the accuracy and attainability of the revenue projections?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

3. Expenditures: *How would you rate the expenditure plan in terms of sound assumptions and priorities consistent with effective operation of the school?*

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: FINANCIAL CAPACITY

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<p>Financial Operation</p> <ul style="list-style-type: none"> - 3-year budget includes conservative assumptions, given current state funding uncertainty, includes start up expenses. - Operating budget includes limited, reasonable donation revenue (based in part of pledges to date). - Appropriate reserve included. Revenue reflects reasonable assumptions of enrollment and attendance, based on parent signatures. <p>Revenues</p> <ul style="list-style-type: none"> - Budget narrative explains revenue assumptions. - Revenue assumptions of funding rates for state, federal and local sources are conservative, School Services of California. <p>Expenditures</p> <ul style="list-style-type: none"> - Assumptions and budget consistent with class sizes. - Spending based on substantial experience of members of petitioning group. - Budget projections of expense cover all major operating expense categories. - Facilities budget is supported by facilities plan for identified potential site. - Teacher salary assumptions cover reasonable range sufficient to attract teachers with the qualifications identified in the petition. 	<p>App. S</p> <p>App. S</p> <p>App. S, T</p> <p>App. T</p> <p>App. T</p> <p>App. T</p> <p>App. T</p> <p>App. T</p> <p>Pg. 103, App. V</p> <p>App. T</p>	<p>Financial Operation</p> <ul style="list-style-type: none"> - Fiscal policies and procedures not included in appendices. <p>Revenues</p> <p>Expenditures</p>	

E. FACILITIES PLAN

The Facilities Plan should demonstrate that the petitioners understand the school's facilities needs and its options for meeting those needs.

Do the petitioners anticipate using a district facility or finding a facility independent of the district?

- Non-district facility** **District facility (Prop 39)**

Select One

X Non-district facility anticipated

A description of the plan for using a non-district facility excels if it has the following characteristics:

- Informed assessment of anticipated facilities needs;
- Estimated costs for anticipated facilities needs based on research and evidence;
- A description of potential sites including location, size and resources;
- Informed analysis of the viability of potential sites;
- Adequate budget for anticipated facilities costs including renovation, rent, maintenance and utilities;
- A schedule for securing a facility including the person responsible for implementation
- An assurance of legal compliance (health and safety, ADA, and applicable building codes); and
- Identified funding sources.

District facility anticipated pursuant to Prop 39

A description of the facilities plan where the applicants have not yet identified a specific site will include the following characteristics:

- Informed assessment and description of anticipated facilities needs;
- Adequate budget based on 3% of anticipated per pupil revenue;
- A thoughtful contingency plan in the event that a mutually agreeable district facility is unable to be procured,
- A site preference with a compelling rationale for the preference; and
- An assurance of legal compliance (health and safety, ADA, and applicable building codes).

Facilities Plan: Does the facilities plan indicate a thorough understanding of the school's needs?

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

ANALYSIS: FACILITIES PLAN

If Meets or Excels; Strengths	Reference	If Approaches or Inadequate; Concerns & Additional Questions	Reference
<ul style="list-style-type: none"> - Petitioners have identified one preferred possible facility and have engaged in sufficient investigation and negotiation to have determined suitability of the site and costs of needed renovations. - Petitioners have also identified a second site, suitable and immediately available. - Costs reflect experience of other schools, gained through past experience of petitioning group and board members. - Petitioners are familiar with legal compliance requirements (health and safety, ADA, and applicable building codes) and have included them in their investigation of potential sites. - Reasonable schedule for facilities preparation, given proposed fall 2012 opening. 	<p>Pg. 103-4, Interview</p> <p>Pg. 103-4, Interview</p> <p>Pg. 103-4, Interview</p> <p>Interviews</p> <p>Pgs. 102-102, App. I</p>		

PETITIONER CAPACITY SUMMARY

Based on the information presented in the petition, how would you rate the likelihood that petitioners will successfully implement the proposed program? Your comments should identify the most significant strengths and weaknesses with respect to petitioner capacity.

Inadequate	Approaches	Meets	Excels
<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>

PETITIONER CAPACITY SUMMARY

Strengths
 The content of the petition, start-up work reflected in the many appendices, responses provided during the petitioner interviews, the school start-up and operating experience of the petitioning group along with the due diligence conducted by staff, demonstrate capacity within the petitioning group that is likely to successfully implement the program as set forth in the petition.

Criteria Not Sufficiently Addressed, Concerns & Additional Questions
 Scope of contract for administrative services needs to be broad enough to cover responsibilities beyond the office manager and other staff positions identified.

SIXTEEN ELEMENTS TABLE

Statutory Reference: E.C. §§ 47605(b) (5) (A) to (P).

The Charter Schools Act requires authorizers to evaluate whether the petitioners have presented a “reasonably comprehensive” description of 16 elements related to a school’s operation (the “16 Elements.”) To complete the following table,

1. Read the Element (column 1)
2. Use column 2 to find your earlier assessment of the item
3. Translate your assessment into a rating of “Inadequate” or “Reasonably Comprehensive” and mark the corresponding box.

Element	Evaluation Reference	Inadequate	Reasonably Comprehensive	Statutory Reference
Description of the educational program of the school, including what it means to be an “educated person” in the 21 st century and how learning best occurs.	<i>Section I., bullet 3</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(A)
Measurable pupil outcomes	<i>Section II.D.</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(B)
Method by which pupil progress is to be measured	<i>Section II.E.</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(C)
Governance structure	<i>Section III.A.</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(D)
Qualifications to be met by individuals employed at the school	<i>Section III.C.1.</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(E)
Procedures for ensuring health & safety of students	<i>Section III.B.2., bullet 1</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(F)
Means for achieving racial and ethnic balance	<i>Section III.B.1., bullet 1</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(G)
Admission requirements, if applicable	<i>Section III.B.1., bullet 3</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(H)
Manner for conducting annual, independent audits	<i>Section III.D.1., bullet 7</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(I)
Suspension and expulsion procedures	<i>Section III.B.2., bullet 2</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(J)
Manner for covering STRS, PERS, or Social Security	<i>Section III.C.3., bullet 3</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(K)
Attendance alternatives for pupils residing within the district	<i>Section III.B.2., Bullet 3</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(L)
Employee rights of return, if any	<i>Section III.C.3., bullet 4</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(M)
Dispute resolution procedure for school-authorizer issues	<i>Section III.B.2., Bullet 4</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(N)
Statement regarding exclusive employer status of the school	<i>Section III.C.3., bullet 5</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(O)
Procedures for school closure	<i>Section III.B.2., Bullet 5</i>	<input type="checkbox"/>	X	E.C. § 47605(b)(5)(P)

ANALYSIS: SIXTEEN ELEMENTS

Comment on strengths and concerns about specific elements only to the extent that you have not already provided the relevant analysis in an earlier section.

Strengths	Reference
Petition as submitted, with appendices, contains reasonably comprehensive descriptions of all required elements set forth in charter law.	

Criteria Not Sufficiently Addressed, Concerns & Additional Questions	Reference
Further detail required to ensure effective opening and operation of the proposed school program are set forth in the Conditions on Opening, which are established as terms and conditions of the charter that are material in nature.	

APPENDIX II - RECOMMENDED CHARTER TEXT REVISIONS: The approved charter is amended from the filed petition to incorporate the revisions below. The charter school must submit to the District's Office of Charter Schools a revised charter to include all revisions outlined below in one hard copy and one electronic copy in *WORD* format on a CD or via email of no later than **5pm on September 30, 2011**.

Charter Text	Text Reference	Recommended Revision
<u>Governance</u>	Page 85	<p>Add the following text:</p> <p><i>"URBAN MONTESSORI CHARTER SCHOOL will comply with the District policy related to charter schools to the extent it aligns with and does not exceed the law applicable to charter schools, as it may be changed from time to time as long as the charter school has been given written notice of the policy change."</i></p>
<u>Student Admissions Policies and Procedures</u>	Page 98	<p>Add the following text and remove any text to the contrary:</p> <p><i>By October 1 of each year, URBAN MONTESSORI CHARTER SCHOOL will notify the District in writing of the application deadline and proposed lottery date. URBAN MONTESSORI CHARTER SCHOOL will ensure that all application materials will reference these dates as well as provide complete information regarding application procedures, key dates, and admissions preferences and requirements consistent with approved charter."</i></p>
<u>Public Records</u>	Page 102	<p>Add the following text and remove any text to the contrary:</p> <p><i>"URBAN MONTESSORI CHARTER SCHOOL acknowledges that pursuant to Article XVI section 8.5(e) of the California Constitution, sections 2(e), 6, and 8 of Proposition 98, and sections 33126.1(b), 35256(c), and 35258 of the Education Code require schools, including URBAN MONTESSORI CHARTER SCHOOL to provide certain information in certain formats in certain ways to the general public and specifically to parents of students at URBAN MONTESSORI CHARTER SCHOOL and of the District. URBAN MONTESSORI CHARTER SCHOOL further acknowledges that it has the obligation to provide all of such information to the District that is required by these referenced authorities in a timely manner so that the District may meet its obligations under those authorities as well. To the extent that there is information that the District has, but that URBAN MONTESSORI CHARTER SCHOOL does not have that URBAN MONTESSORI CHARTER SCHOOL needs in order to meet its obligations, the District shall provide the same to URBAN MONTESSORI CHARTER SCHOOL in a reasonably timely manner upon request."</i></p>
<u>Reporting and Accountability</u>	Page 83	<p>Add the following text and remove any text to the contrary:</p> <p><i>"If URBAN MONTESSORI CHARTER SCHOOL does not test</i></p>

		<p><i>(i.e., STAR) with the District, URBAN MONTESSORI CHARTER SCHOOL hereby grants authority to the State of California to provide a copy of all test results directly to the District as well as the charter school.</i></p> <p><i>Test results for the prior year, if not provided directly to the District by the State, will be provided by the charter school to the District no later than September 1 of each year."</i></p>
<u>External Reporting</u>	Page 102	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"The School URBAN MONTESSORI CHARTER SCHOOL will maintain sufficient staff and systems including technology, required to ensure timely reporting necessary to comply with the law and to meet all reasonable inquiries from District and other authorized reporting agencies."</i></p>
<u>Governance Structure of the School</u>	Pages 84	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"Pursuant to URBAN MONTESSORI CHARTER SCHOOL, in accordance with Education Code Section 47604.3, the school shall promptly respond to all reasonable inquiries, including, but not limited to, inquiries regarding financial records, from the District Office of Education, District Board of Education, and the State Superintendent of Public Instruction and shall consult with the District regarding any such inquiries. URBAN MONTESSORI CHARTER SCHOOL acknowledges that it is subject to audit by OUSD if OUSD seeks an audit of URBAN MONTESSORI CHARTER SCHOOL, it shall assume all costs of such audit. This obligation for the District to pay for an audit only applies if the audit requested is specifically requested by the District and is not otherwise required to be completed by URBAN MONTESSORI CHARTER SCHOOL by law or charter provisions."</i></p>
<u>Governance Structure</u>	Page 85	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"Members of URBAN MONTESSORI CHARTER SCHOOL's Governing Board, any administrators, managers or employees, and any other committees of the School shall at all times comply with federal and state laws, nonprofit integrity standards and OUSD's Charter School policies and regulations regarding ethics and conflicts of interest so long as such policies and regulations are not in conflict with any then-existing applicable statutes or regulations applicable to charter schools.</i></p> <p><i>URBAN MONTESSORI CHARTER SCHOOL and/or its non-profit corporation will be solely responsible for the debts and obligations of the charter school."</i></p>
<u>Addressing Parent Complaints</u>	Page 97	<p><u>Add the following text and remove any text to the contrary:</u></p>

~~The school~~ **URBAN MONTESSORI CHARTER SCHOOL** will establish ~~and communicate through parent and employee handbooks~~ complaint procedures that address both complaints alleging discrimination or violations of law and complaints regarding other areas. ~~The school~~ **URBAN MONTESSORI CHARTER SCHOOL** will not, at any time, refer ~~internal~~ complaints to the District.

The complaint procedures will include the clear information with respect to the response timeline of the school, whether the school's response will be in writing, the party identified to respond to complaints, the party identified and charged with making final decisions regarding complaints, and whether the final decision will be issued in writing. The procedures will also identify an ombudsperson for situations in which the school leader is the subject of the complaint. The complaint procedures will be clearly articulated in the school's student and family handbook or distributed widely.

URBAN MONTESSORI CHARTER SCHOOL will designate at least one employee to coordinate its efforts to comply with and carry out its responsibilities under Title IX of the Education Amendments of 1972 (Title IX) and Section 504 of the Rehabilitation Act of 1973 (Section 504) including any investigation of any complaint filed with URBAN MONTESSORI CHARTER SCHOOL alleging its noncompliance with these laws or alleging any actions which would be prohibited by these laws. URBAN MONTESSORI CHARTER SCHOOL will notify all its students and employees of the name, office address, and telephone number of the designated employee or employees.

URBAN MONTESSORI CHARTER SCHOOL will adopt and publish grievance procedures providing for prompt and equitable resolution of student and employee complaints alleging any action, which would be prohibited by Title IX, or Section 504.

URBAN MONTESSORI CHARTER SCHOOL will implement specific and continuing steps to notify applicants for admission and employment, students and parents of elementary and secondary school students, employees, sources of referral of applicants for admission and employment, and all unions or professional organizations holding collective bargaining or professional agreements with the recipient, that it does not discriminate on the basis of sex or mental or physical disability in the educational program or activity which it operates, and that it is required by Title IX and Section 504 not to discriminate in such a manner."

<p><u>Health and Safety Procedures</u></p>	<p>Page 95</p>	<p>Add the following text and remove any text to the contrary:</p> <p><i>“URBAN MONTESSORI CHARTER SCHOOL shall occupy facilities that comply with the Asbestos requirement as cited in the Asbestos Hazard Emergency Response Act (AHERA), 40CFR part 763. AHERA requires that any building leased or acquired that is to be used as a school or administrative building shall maintain an asbestos management plan.”</i></p>
<p><u>Dispute Resolutions Procedures</u></p>	<p>Page 96-97</p>	<p>Add the following text and remove any text to the contrary:</p> <p><i>“The staff and Governing Board members of URBAN MONTESSORI CHARTER SCHOOL agree to attempt to resolve all disputes between the District and URBAN MONTESSORI CHARTER SCHOOL regarding this charter pursuant to the terms of this section. Both will refrain from public commentary regarding any disputes until the matter has progressed through the dispute resolution process.</i></p> <p><i>Any controversy or claim arising out of or relating to the charter agreement between the District and URBAN MONTESSORI CHARTER SCHOOL, except any controversy or claim that in any way related to revocation of this charter, shall be handled first through an informal process in accordance with the procedures set forth below.</i></p> <p><i>(1) Any controversy or claim arising out of or relating to the charter agreement, except any controversy or claim that in any way related to revocation of this charter, must be put in writing (“Written Notification”) by the party asserting the existence of such dispute. The Written Notification must identify the nature of the dispute and all supporting facts known to the party giving the Written Notification. The Written Notification may be tendered by personal delivery, by facsimile, or by certified mail. The Written Notification shall be deemed received (a) if personally delivered, upon date of delivery to the address of the person to receive such notice if delivered by 5:00 PM or otherwise on the business day following personal delivery; (b) if by facsimile, upon electronic confirmation of receipt; or (c) if by mail, two (2) business days after deposit in the U.S. Mail. All written notices shall be addressed as follows:</i></p> <p><i>To Charter School, c/o School Director: URBAN MONTESSORI CHARTER SCHOOL</i></p> <p><i>To Coordinator, Office of Charter Schools: Tilden School 4551 Steele Street, Room 11 Oakland, California 94619</i></p>

		<p>(2) A written response (“Written Response”) shall be tendered to the party providing the Written Notification within twenty (20) business days from the date of receipt of the Written Notification. The Written Response shall state the responding party’s position on all issues stated in the Written Notification and set forth all fact which the responding party believes supports its position. The Written Response may be tendered by personal delivery, by facsimile, or by certified mail. The Written Response shall be deemed received (a) if personally delivered, upon date of delivery to the address of the person to receive such notice if delivered by 5:00p.m., or otherwise on the business day following personal delivery; (b) if by facsimile, upon electronic confirmation of receipt; or (c) if by mail, two (2) business days after deposit in the U.S. Mail. The parties agree to schedule a conference to discuss the claim or controversy (“Issue Conference”). The Issue Conference shall take place within fifteen (15) business days from the date the Written Response is received by the other party.</p> <p>(3) If the controversy, claim, or dispute is not resolved by mutual agreement at the Issue Conference, then either party may request that the matter be resolved by mediation. Each party shall bear its own costs and expenses associated with the mediation. The mediator’s fees and the administrative fees of the mediation shall be shared equally among the parties. Mediation proceedings shall commence within 60 days from the date of the Issue Conference. The parties shall mutually agree upon the selection of a mediator to resolve the controversy or claim at dispute. If no agreement on a mediator is reached within 30 days after a request to mediate, the parties will use the processes and procedures of the American Arbitration Association (“AAA”) to have an arbitrator appointed...</p> <p>(4) If the mediation is not successful, the parties agree that each party has exhausted its administrative remedies and shall have any such recourse available by law</p>
<p><u>Suspension and Expulsion: Due Process for Students with Disabilities</u></p>	<p>Pages 101</p>	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>“In the case of a special education student, or a student who receives 504 accommodations, the School URBAN MONTESSORI CHARTER SCHOOL will ensure that it makes the necessary adjustments to comply with the mandates of State and federal laws, including the IDEA and Section 504 of the Rehabilitation Plan of 1973, regarding the discipline of students with disabilities. Prior to recommending expulsion for a Section 504 student or special education student, the charter administrator will convene a review committee to</i></p>

		<p>determine 1) if the conduct in question was caused by, or had a direct and substantial relationship to the child's disability; or 2) if the conduct in question was the direct result of the LEA's failure to implement the 504 plan or IEP. If it is determined that the student's misconduct was not caused by or had direct and substantial relationship to the child's disability or the conduct in question was not a direct result of the LEA's failure to implement the 504 plan or IEP, the student may be expelled."</p>
<p><u>Independent Fiscal Audits</u></p>	<p>Page 104</p>	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"To the extent that URBAN MONTESSORI CHARTER SCHOOL is a recipient of federal funds, including federal Title I, Part A funds, URBAN MONTESSORI CHARTER SCHOOL has agreed to meet all of the programmatic, fiscal and other regulatory requirements of the No Child Left Behind Act and other applicable federal grant programs. URBAN MONTESSORI CHARTER SCHOOL agrees that it will keep and make available to the District any documentation necessary to demonstrate compliance with the requirements of the No Child Left Behind Act and other applicable federal programs, including, but not limited to, documentation related to required parental notifications, appropriate credentialing of teaching and paraprofessional staff, where applicable, or any other mandated federal program requirement. The mandated requirements of NCLB include, but are not the limited to, the following:</i></p> <ul style="list-style-type: none"> • <i>Notify parents at the beginning of each school year of their "right to know" the professional qualifications of their child's classroom teacher including a timely notice to each individual parent that the parent's child has been assigned, or taught for four or more consecutive weeks by, a teacher who is not highly qualified.</i> • <i>Develop jointly with, and distribute to, parents of participating children, a school-parent compact.</i> • <i>Hold an annual Title I meeting for parents of participating Title I students.</i> • <i>Develop jointly with, agree on with, and distribute to, parents of participating children a written parent involvement policy.</i> <p><i>URBAN MONTESSORI CHARTER SCHOOL also understands that as part of its oversight of the school, the Office of Charter Schools may conduct program review of federal and state compliance issues."</i></p>
<p><u>Facilities</u></p>	<p>Page 103</p>	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"If URBAN MONTESSORI CHARTER SCHOOL fails to submit a certificate of occupancy or other valid documentation to the</i></p>

		<p><i>District verifying that the intended facility in which the school will operate complies with Education Code Section 47610, not less than 30 days before the school is scheduled to begin operation pursuant to the first year of this renewal term, it may not commence operations unless an exception is made by the Office of Charter Schools and/or the local planning department or equivalent agency. If URBAN MONTESSORI CHARTER SCHOOL moves or expands to another facility during the term of this charter, URBAN MONTESSORI CHARTER SCHOOL shall provide a certificate of occupancy or other valid documentation to the District verifying that the intended facility in which the school will operate complies with Education Code Section 47610, to the District for each facility at least 30 days before school is scheduled to begin operations in the facility or facilities. URBAN MONTESSORI CHARTER SCHOOL shall not begin operation in any location for which it has failed to timely provide a certificate of occupancy to the District, unless an exception is made by the Office of Charter Schools and/or the local planning department or equivalent agency.</i></p> <p><i>Notwithstanding any language to the contrary in this charter, the interpretation, application, and enforcement of this provision are not subject to the Dispute Resolution Process."</i></p>
<u>District Fee for Oversight</u>	Page 104	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"The District may charge for the actual costs of supervisory oversight of the School URBAN MONTESSORI CHARTER SCHOOL not to exceed 1% of the charter School's revenue, or the District may charge for the actual costs of supervisory oversight of the Charter School not to exceed 3% if the School URBAN MONTESSORI CHARTER SCHOOL is able to obtain substantially rent free facilities from the District.</i></p> <p><i>Notwithstanding the foregoing, the District may charge the maximum supervisory oversight fee allowed under the law as it may change from time to time."</i></p>
<u>Miscellaneous Charter-Related Issues</u>	Page 108	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"URBAN MONTESSORI CHARTER SCHOOL must submit its renewal petition to the Office of Charter Schools no earlier than 270 days before the charter is due to expire unless otherwise agreed by the Office of Charter Schools."</i></p>
<u>Miscellaneous Charter-Related Issues</u>	Page 108	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>"The District may revoke the charter of the School URBAN MONTESSORI CHARTER SCHOOL in accordance with Education Code Section 47607. any successor provisions to section 47607, or other statutory provisions, if enacted after</i></p>

		<i>the date of the charter, regarding the revocation of charters.</i>
<u>Impact on Charter Authorizer</u>	Page 107	<p><u>Add the following text and remove any text to the contrary:</u></p> <p>In order to ensure the necessary oversight and review of mandated reports for which the authorizer must determine fiscal health and sustainability, the following schedule of reporting deadline to the District will apply each year of the term of this charter;</p> <ul style="list-style-type: none"> ○ September 15-1 – Final Unaudited Financial Report for Prior Year ○ December 1 – Final Audited Financial Report for Prior Year ○ December 15-1 – First Interim Financial Report for Current Year ○ December 15 – Schedule of Expenditures of Federal Awards ○ March 15-1 – Second Interim Financial Report for Current Year ○ July-June 1-15 – Preliminary Budget for Subsequent Year
<u>Impact on Charter Authorizer</u>	Page 107	<p><u>Add the following text and remove any text to the contrary:</u></p> <p><i>“URBAN MONTESSORI CHARTER SCHOOL agrees to observe and abide by the following terms and conditions as a requirement for receiving and maintaining their charter authorization:</i></p> <ul style="list-style-type: none"> • <i>URBAN MONTESSORI CHARTER SCHOOL is subject to District oversight.</i> • <i>The District’s statutory oversight responsibility continues throughout the life of the charter and requires that it, among other things, monitor the fiscal condition of URBAN MONTESSORI CHARTER SCHOOL.</i> • <i>The District is authorized to revoke this charter for, among other reasons, the failure of URBAN MONTESSORI CHARTER SCHOOL to meet generally accepted accounting principles or if it engages in fiscal mismanagement in accordance with Education Code Section 47607.</i> <p><i>Accordingly, the District hereby reserves the right, at District cost, pursuant to its oversight responsibility, to audit URBAN MONTESSORI CHARTER SCHOOL books, records, data, processes and procedures through the Office of Charter Schools or other means. The audit may include, but is not limited to, the following areas:</i></p>

	<ul style="list-style-type: none"> • <i>Compliance with terms and conditions prescribed in the charter,</i> • <i>Internal controls, both financial and operational in nature,</i> • <i>The accuracy, recording and/or reporting of school financial information,</i> • <i>The school's debt structure,</i> • <i>Governance policies, procedures and history,</i> • <i>The recording and reporting of attendance data,</i> • <i>The school's enrollment process, suspension and expulsion procedures, and parent involvement practices,</i> • <i>Compliance with safety plans and procedures, and</i> • <i>Compliance with applicable grant requirements.</i> <p><i>URBAN MONTESSORI CHARTER SCHOOL shall cooperate fully with such audits and to make available any and all records necessary for the performance of the audit upon 30 days notice to URBAN MONTESSORI CHARTER SCHOOL. When 30 days notice may defeat the purpose of the audit, the District may conduct the audit upon 24 hours notice.</i></p> <p><i>In addition, if an allegation of waste, fraud or abuse related to URBAN MONTESSORI CHARTER SCHOOL operations is received by the District, the URBAN MONTESSORI CHARTER SCHOOL shall be expected to cooperate with any investigation undertaken by the Office of Charter Schools , at District cost. This obligation for the District to pay for an audit only applies if the audit requested is specifically requested by the District and is not otherwise required to be completed by URBAN MONTESSORI CHARTER SCHOOL by law or charter provisions"</i></p>
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ATTACHMENT III - 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 guadalupe.navarro@ousd.k12.ca.us or hand-delivered to OUSD Office of Charter Schools at Tilden School, 4551 Steele Street, Room 11. *Hand-delivered items must receive a receipt from the Office of Charter Schools to ensure verification of timely submission.*

Charter Revision		
September 30, 2011	<input type="checkbox"/>	Submit to the District’s Office of Charter Schools one hard copy and one electronic copy in <i>MS Word</i> format of a Track Changes version of the revised charter, as well as a Final Text version of the revised petition to include all revisions outlined in the charter approval.
Enrollment Policies and Application for Admission		
July 31, 2012	<input type="checkbox"/>	Submit Board-approved Enrollment Policy and an Application for Admission.
July 31, 2012	<input type="checkbox"/>	Submit list of enrolled students--including name, DOB, prior school, home language, Oakland residency or not, and CSIS number (list to be updated September 15, 2011 and annually) using Excel template provided by the Office of Charter Schools.*
Complaint Procedures		
July 31, 2012	<input type="checkbox"/>	Submit Board-approved Uniform Complaint Process, posting location(s), and method of notifying parents of this annually.
Student Learning Time		
July 31, 2012	<input type="checkbox"/>	Submit certification of instructional hours to be provided in 2012-2013.* Carefully read <i>Education Code §46201(a)(3)</i> . [instructional minutes requirement]
	<input type="checkbox"/>	Submit 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		
July 31, 2012	<input type="checkbox"/>	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.)
	<input type="checkbox"/>	Submit Governing Board-approved Code of Conduct. (Prepare the school’s Code of Conduct so that it is consistent with the program and school characteristics outlined in your charter petition, as well as with applicable California <i>Education Code</i> .)
Insurance Policies		
July 31, 2012	<input type="checkbox"/>	Submit evidence of commercial general liability insurance for not less than \$1,000,000 per incident; to include the District as additionally insured.
	<input type="checkbox"/>	Submit evidence of fidelity bond coverage for not less than \$50,000 per occurrence and workers’ compensation insurance.
Financial Organization		
July 31, 2012	<input type="checkbox"/>	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		
June 26, 2012	<input type="checkbox"/>	Submit a copy of an executed lease or deed for a facility, or suitable comparable, noting occupancy on or before June 26, 2012.
	<input type="checkbox"/>	Submit written assurance that the facility selected for the school is programmatically accessible to physically handicapped individuals.
	<input type="checkbox"/>	Make available for inspection a current Certificate of Occupancy.
	<input type="checkbox"/>	Make available for inspection a current Fire Inspection Certificate.

	<input type="checkbox"/>	Make available for inspection a current Building Safety Inspection Certificate.
	<input type="checkbox"/>	Make available for inspection a current Health Inspection.
	<input type="checkbox"/>	Make available for inspection a current Asbestos Inspection Report and Management Plan.
July 31, 2012	<input type="checkbox"/>	Submit Blood Borne Pathogens Exposure Control Plan.
	<input type="checkbox"/>	Submit Facilities Safety and Evacuation Plan.
	<input type="checkbox"/>	Submit Board-approved Emergency Preparedness Handbook.
	<input type="checkbox"/>	Submit Board-approved Drug, Alcohol, and Smoke Free Environment Policies and Procedures.
Special Education Program Plan		
July 31, 2012	<input type="checkbox"/>	Submit executed MOU for special education services.
	<input type="checkbox"/>	Submit adopted 504 plan, policy, and procedures.
	<input type="checkbox"/>	Submit Special Education Identification and Assessment Plan.
Budget and Cash Flow		
July 31, 2012	<input type="checkbox"/>	Submit 2 paper copies, in addition to an electronic version of an updated and revised cash flow statement and 3-year projections. Include revised facility expenses.
School Health Plan and Medications Administration Plan		
July 31, 2012	<input type="checkbox"/>	Submit School Health Plan (to comply with immunization audit, hearing and vision screening requirements) and Medications Administration Plan.
Instructional Staff		
July 31, 2012	<input type="checkbox"/>	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, date of background review.*
	<input type="checkbox"/>	Submit employee handbook, including policies and procedures that ensure the health and safety of students and staff.
July 31, 2012	<input type="checkbox"/>	Submit list of teachers requiring Beginning Teacher Support and Assessment.
	<input type="checkbox"/>	Submit Board-approved personnel policies.
Programming Plans		
July 31, 2012	<input type="checkbox"/>	Submit English Learner Plan--adopted policies and procedures that pertain to use of a home language survey and mandatory CELDT testing.
	<input type="checkbox"/>	Submit a list of which courses the school considers non-core, non-college preparatory courses.
	<input type="checkbox"/>	Submit a course catalog, or equivalent, notifying parents about transferability of courses to other public schools and the ability of courses to meet college entrance requirements.
Evaluation of School Leader, School Administrators, and Teachers		
July 31, 2012	<input type="checkbox"/>	Submit performance evaluation criteria and evaluation plan templates for school site leader/administrator and teachers.