

## Los Angeles County Office of Education

Charter School Office  
12830 Columbia Way  
Downey, CA 90242  
(562) 922-8806

### Overview of the Process for Considering a Petition to Establish a Direct County Charter

The Los Angeles County Office of Education (LACOE) receives and reviews petitions on behalf of the Los Angeles County Board of Education (County Board). The initial petition to establish a Direct County charter is considered to have been received when the petitioner has submitted all of the following:

1. The petition must include a narrative statement explaining how the charter school *will serve pupils for whom the county office of education would otherwise be responsible for providing direct education and related services (Education Code (EC) 47605.5)*. A county office is responsible for providing services to adjudicated and expelled students; these are the student populations that may be served (County Board Policy).
2. The charter petition and all supporting documents, including budgets (*EC 47607*). The elements of the petition must follow the order presented in *EC 47605*. Include the language of the *Education Code* as the heading to each section.
3. Documentation that the school's governing body has approved the petition, proposed budget and submission of the charter petition to the County Board.
4. Completed and signed forms: *Notice of Submission: Petition to Establish a Direct County Charter* and *Required Documents: Petition to Establish a Direct County Charter*.

**Items 1 – 4 constitute a Submission Package; receipt of all required documentation triggers the timeline for County Board action.**

*Additional Documents:* Once the petition is considered to have been received, no additional documents will be considered unless requested by LACOE to clarify and/or substantiate the petition and/or budget content. Additional information may be requested during the review process.

### Verification Process

Prior to review of a petition, LACOE verifies:

1. The charter petition meets the statutory requirements for a petition that can be heard directly by the County Board under *EC 47605.5*.
2. The authenticity of petition signatures: (A) Teacher signatories must have been meaningfully interested in and qualified to work at the charter at the time of signature; (B) parent signatories had children who were or would be eligible to attend the charter; and (C) that signatories had the opportunity to review the petition.
3. The submission complies with statutory and regulatory requirements. If LACOE determines the petitioner has not submitted all required documents, the petitioner will be given the option of withdrawing and resubmitting the petition or informing LACOE that it should complete the review based on documents submitted. LACOE shall inform the petitioner of the applicable statutory and regulatory timelines and permissible extensions of those timelines to support the petitioner in making an informed decision. LACOE submits requests for timeline extensions to the County Board for action.

### Review Process

LACOE utilizes a review protocol based on the model and standards developed by the California Department of Education (CDE). The protocol has been modified to reflect the County Board as the potential authorizer.

In addition to reviewing the petition and supporting documents, LACOE reviews publicly available information regarding the school (in the case of a renewal), the petitioners and other schools the petitioners have been associated with. Information reviewed includes school level data available through the CDE DataQuest website, as well as other publicly available documents such as news articles and financial audits.

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**Capacity Interview**

LACOE interviews the governing board and leadership team to help determine if the board has the capacity to govern the school and the leadership team has the background necessary to implement the charter. Information from the interview is included in the staff report.

**Presentations to the County Board (Board Meeting Dates)**

The County Board typically considers a petition at two (2) separate regularly scheduled meetings:

1. Public Hearing – Held within 30 calendar days of receipt of a Submission Package for a Direct County Charter. It is the petitioner's opportunity to demonstrate support for the charter and provide an overview of the school's proposed educational program including the school's mission, the educational design and how the proposed school will fulfill the legislative intent of the *Charter Schools Act (EC 47601)*.
2. Staff Report on Findings of Fact and County Board Action – Held within 60 calendar days of receipt of a Submission Package for a Direct County unless both parties agree to an extension of up to 30 days. (The request for an extension must be made prior to the County Board taking a vote to approve or deny the charter petition.) The petitioner may address the County Board, and the County Board may ask questions of LACOE staff and the petitioner.

The County Board typically meets the first three (3) Tuesdays of the month. The County Board calendar is available at <https://www.lacoe.edu/Board-of-Education/Board-Agendas-Minutes-Meetings>.

**Notification**

LACOE notifies the petitioner in writing when (1) the Submission Package is received; (2) the date and time of the Capacity Interview are set; and (3) the dates of the Public Hearing, Report, and Board Action are established.

Please review the documents entitled, *Notice of Submission: Petition to Establish a Direct County Charter* and *Required Documents: Petition to Establish a Direct County Charter* for further information regarding submitting a petition directly to the County Board.

Petitioners may contact the Charter School Office at (562) 922-8806 for additional information.

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**Notice of Submission: Petition to Establish a Direct County Charter (EC 47605.5)**

*Submit form with petition documents*

*Please print or type*

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

**Contact Information:**

Name of lead petitioner(s) / relationship to charter school: \_\_\_\_\_

Name of lead contact (if not petitioner): \_\_\_\_\_

Address: Street \_\_\_\_\_

City \_\_\_\_\_

State/Zip code \_\_\_\_\_

Telephone number(s): Office \_\_\_\_\_

Mobile \_\_\_\_\_

FAX number: \_\_\_\_\_

Email: \_\_\_\_\_

**School Information:**

Proposed enrollment: First year: \_\_\_\_\_ Fully implemented: \_\_\_\_\_

Proposed grade levels: First year: \_\_\_\_\_ Fully implemented: \_\_\_\_\_

Proposed opening date (if authorized): \_\_\_\_\_

Proposed or actual school location / address: Street \_\_\_\_\_

*If more than one site, provide main site here; attach list of additional site addresses.* City \_\_\_\_\_

State/Zip code \_\_\_\_\_

**Notice of Submission:**

Signature of lead petitioner(s): \_\_\_\_\_

Date: \_\_\_\_\_

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**Required Documents: Petition to Establish a Direct County Charter (EC 47605.5)**

**Directions:**

- Submit all documents within the submission package noted below simultaneously in a loose-leaf (3-ring) binder with numbered dividers inserted to match the sections noted below.
- Continuously page number (paginate) the entire document (excluding dividers) and ensure the pagination is accurately reflected within the Table of Contents.
- Also submit an electronic copy via Flash Drive of all items and sections to directly mirror the hardcopy.
  - Items 1 – 2 may be combined as one file
  - Table of Contents and each section shall be submitted as separate files.
  - Submit Section I as five (5) separate files (I.1, I.2, I.3, I.4, I.5).
  - Submit Section II as ten (10) separate files; budgets and projections must be submitted as unlocked spreadsheets in excel format (displaying formulas).

**Submission Package:** Submit one (1) set of the following required documents to the Los Angeles County Office of Education (LACOE) Charter School Office.

**Check items submitted and submit form with petition documents**

- 1. Completed and signed *Notice of Submission: Petition to Establish a Direct County Charter* Form
- 2. Completed and signed *Required Documents: Petition to Establish a Direct County Charter* Form

**Section I**

- I.1 Table of Contents for Sections I through V (identify page number for each required element)
- I.2 List of Affirmations and Assurances signed by petitioner
- I.3 Evidence the school's governing body approved submission of the petition to the County Board
- I.4 Charter Petition pursuant to EC 47605 and 47505.5 (Direct) with each element identified by EC section
- I.5 List of Board members and Resumes with contact information for all key individuals (petitioner(s), school leadership, etc.)

**Section II**

- II.1 Proposed first year operational budget with SAC codes, including start-up costs, cash-flow, budget narratives and assumptions
- II.2 Financial projections for the first five (5) years of operation (multi-year projection) in excel format with SACS codes
  - (1) Budget Narratives and Assumptions
  - (2) Three-Year Cash Flow
  - (3) Staffing Salary Schedule with object codes, position, salary and benefits
- II.3 Organizational Chart including CMO if applicable
- II.4 Copies of the three (3) most recent Independent Financial Audit(s) of 501(c)(3) (if applicable)
- II.5 Fiscal Policies with evidence that they were approved by the governing board
- II.6 General Ledger for both the non-profit entity holding the charter and the school for the three (3) months prior to petition submission to local district (if applicable)
- II.7 Debt Schedule including total principal, interest due and term of debt (if applicable). Include all loans, bonds, lines of credit, inter-company borrowing or transfer agreements including repayment terms, and commitment letters (sale of receivables)

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- II.8 All Bank Statements including any related foundations such as Parent Teacher Organization (PTO), petty cash accounts with monthly reconciliation for the three (3) months prior to petition submission to local district (if applicable)
- II.9 Contracts (if applicable):
  - Board approved contract and share allocated costs agreement (i.e CMO fees, indirect cost, or any fees charged by the non-profit entity holding the charter)
  - Signed Contracts exceeding \$5,000 annually
- II.10 Public Charter Schools Grant Program application and budget (if applicable)

#### Section III

- III.1 Required signatures of meaningfully interested parents (include name, mailing address, telephone number, age(s) of child(ren)) or teachers (include name, mailing address, telephone number)
- III.2 Credentials for meaningfully interested teachers (if teacher signatures were submitted)

#### Section IV

- IV.1 Bylaws of 501(c)(3) (if not included in section 1.4)
- IV.2 Current Approved and Stamped Articles of Incorporation of 501(c)(3) (if not included in section 1.4)

#### Section V

- V.1 Lease/Rental Agreement(s) or Similar Document(s) (if site has been secured)
- V.2 Certificate of Occupancy(ies) (if site has been secured)

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Once LACOE verifies that all required documents have been submitted, it will notify the petitioner in writing. The petitioner shall have no less than five (5) working days to submit 13 collated, two-sided (back-to-back), three-hole punched, rubber-banded copies of Sections I through V. These documents are made available to the public as well as the County Board and LACOE staff. It is the petitioner's responsibility to redact sensitive information (i.e. personal contact information, bank account numbers, etc.) prior to submission of these copies.

LACOE reserves the right to request additional documents and information as necessary to provide the County Board with a complete understanding of the proposed charter.

LACOE may conduct a facilities inspection as part of the petition review process or prior to opening, if authorized.

### Required Certification

Submission of a petition and this signed document certifies that:

1. The governing board has taken action to approve the submitted petition and budget.
2. The governing board has taken action to approve submission of the petition to the County Board.
3. The governing board and lead petitioner(s) has received, **read, understands, and intend** to adhere to the requirements outlined in this document, the *Overview of the Process for Considering a Petition to Establish a Direct County Charter*\*; Los Angeles County Board Policies and Administrative Regulations regarding Charter Schools\*\*; and the Charter School Monitoring and Oversight Memorandum of Understanding (MOU)\*\*.\*.

Printed name of board signatory: \_\_\_\_\_

Signature of board signatory: \_\_\_\_\_ Date: \_\_\_\_\_

Printed name of lead petitioner(s): \_\_\_\_\_

Signature of lead petitioner(s): \_\_\_\_\_ Date: \_\_\_\_\_

\*Please review the document, *Overview of the Process for Considering a Petition to Establish a Direct County Charter* or contact the Charter School Office for additional information.

\*\**Los Angeles County Board Policies and Regulations are available at  
<http://gamutonline.net/district/lacoe/PolicyCategoryList/2422/0>*

\*\*\**The Charter School Monitoring and Oversight MOU is available at  
[https://www.lacoe.edu/Portals/0/LACOE/CharterSchools/1%20MOU\\_Template\\_FINAL\\_11-2018.pdf](https://www.lacoe.edu/Portals/0/LACOE/CharterSchools/1%20MOU_Template_FINAL_11-2018.pdf)*