

SDUSD Charter School Policy:**Charter Advisory Group**

The Charter Advisory Group (CAG) will consist of charter school administrators and district staff. The committee will be a standing committee and may meet on a bi-monthly basis, or as needed. The CAG will make recommendations to the Office of Charter Schools (OCS). The OCS will present recommendations to the San Diego Unified School District board.

The CAG may serve three main purposes:

- I. Conduct capacity interviews with new charter school developers;
- II. Review meaningful complaints from students, parents, or staff at charter schools (unless there are privacy concerns)¹, and;
- III. Review and update any charter procedures or policies, as appropriate.

The three purposes are further described below:

I. Conduct capacity interviews with NEW charter school developers

Capacity interviews may be conducted in person by at least 2 members of the CAG and one member of the OCS to examine the following:

- Academic strength of the proposed program.
- Financial understanding to implement the educational program described in the proposed charter.
- Governance, operational, and leadership knowledge and expertise.
- Criteria and interview questions will be developed by the CAG to assess the charter developer's viability in three areas described above.

The OCS will make recommendations to approve a new charter petition for *three to five years*, or to deny the charter petition. In making its recommendation, the OCS will consider input from the CAG as well as the capacity interview.

The recommendations regarding the term of a NEW charter may include the following considerations:

- The leadership team of the new charter petition will demonstrate ability to operate a successful program in the areas of academics, finance, and/or governance.
- The proposed charter school will offer an innovative and unique educational program.

¹ The charter school's participation in meeting with the CAG, implementing the CAG's recommendations, and/or reconstitute its governing board is voluntary. Either the district or charter school may decline to participate in the interventions described in section 2.

- The annual operating budgets will be submitted that include the planning period and the first five years of school operations. The cumulative net income from these budget projections will provide evidence of the school's ability to establish a minimum of a 2% operating reserve by the end of the 1st year of operations; 3% by the end of the 2nd year of operations, 4% by the end of the 3rd year of operations, and 5% as of the end of the 4th year of operations. The reserve shall be defined as the cumulative net unrestricted income divided by annual expenditures of unrestricted funds. The projections will be accompanied by the assumptions used in projecting income and expense by major line item. The annual operating budgets will be based upon an accrual accounting method (allowing recognition of earned income to be acknowledged as a receivable at year end).
- Cash flow projections, on a monthly basis through the first 24 months of school operations, providing evidence of the charter school's ability to weather cash deferrals while meeting all obligations. The cash flow analysis, unlike the operating budgets, will be performed on a cash; not accrual, basis. If the proposed charter school cash flow will depend upon borrowing from any source, the cash flow projections must clearly segregate the short term financing and explain the expected source or sources of such financing, and illustrate how such short term financing will be repaid.
- The charter petition describes a process for establishing decision-making processes of the school that give all stakeholders (parents, etc.) an opportunity to impact actions taken by charter school.
- The charter petition includes documentation of a significant and meaningful partnership with an organization committed to providing long-term support. Example partners:
 - Teacher mentoring, student internships, board membership, or documentation of partnership/sponsorship with a financially stable CMO.
 - UCSD, Chamber of Commerce, Boys & Girls Club, etc. Example support: Financial support – grants, loans, or fundraising

If a charter school petition inadequately addresses a consideration identified-above, such a failure shall not form the sole basis to deny, or grant a petition for less than 5 years, unless the SDUSD Board of Education makes written factual findings under Education Code section 47605(b)

II. Review meaningful complaints from students, parents, or staff at charter schools (unless there are privacy concerns)

- The charter school's participation in meeting with the CAG, implementing the CAG's recommendations, and/or reconstitute its governing board is voluntary. Either the district or charter school may decline to participate in the interventions described in this section (Section II).
- Complaints must exhaust the internal complaint process at the charter school before this section (Section II) of the policy is engaged (unless this regards imminent health and safety concerns).
- If a meaningful number of charter school students, parents or staff submits complaints or concerns about their charter school to the OCS, the OCS may convene some or all of the members the CAG to review the complaints/concerns. Upon agreement from the charter school that is the source of the complaints, the CAG may offer to meet with the concerned parties and the charter school administration/board and make recommendations, which may include an action plan, to the charter school. The OCS may report out the recommendations and provide updates to the SDUSD Board.
- The decision to convene the CAG to review complaints/concerns would be determined on a case-by-case basis by the OCS and CAG.
- A possible final intervention may include the reconstitution of the charter school governing board, as mutually agreed by the district and charter school, which may include a majority or all new charter board members who are elected by parents of students and/or staff of the charter school.

III. Review and update any charter procedures or policies, as appropriate

- The OCS and the CAG will meet on a regular, mutually agreed upon basis, to plan charter leader meetings.
- The OCS may call the CAG together to work to develop and update district policies that relate to charter schools.

These policies may be waived if there is a determination of imminent health and safety concerns.